GUIDE

Microsoft Dynamics 365 for Hootsuite

Set Up Guide & User Manual

Hootsuite™

Overview

The main purpose of the Microsoft Dynamics 365 plug-in application is to empower sales and customer-facing teams to address customer issues, influence buying decisions and shorten sales cycles through better understanding of needs and communication of solutions with customers and prospects through social media.

The main features that the Microsoft Dynamics 365 plug-in application contains, grouped by functional categories are:

Search in Microsoft Dynamics Database:

- Query with Social Data
- Search Results Page
- Filters for results
- New Search
- Selecting Results

Entities:

- Create, view and update Leads and Opportunities manually and using social data from native streams
- Create, view and update Contacts and Accounts manually and from native streams
- Create, view and update Cases and Activities manually and using social data from native streams
- Associating Leads with Opportunities
- Associating Contacts with Accounts

Prerequisites

Microsoft Dynamics 365 Custom Fields Solution Install

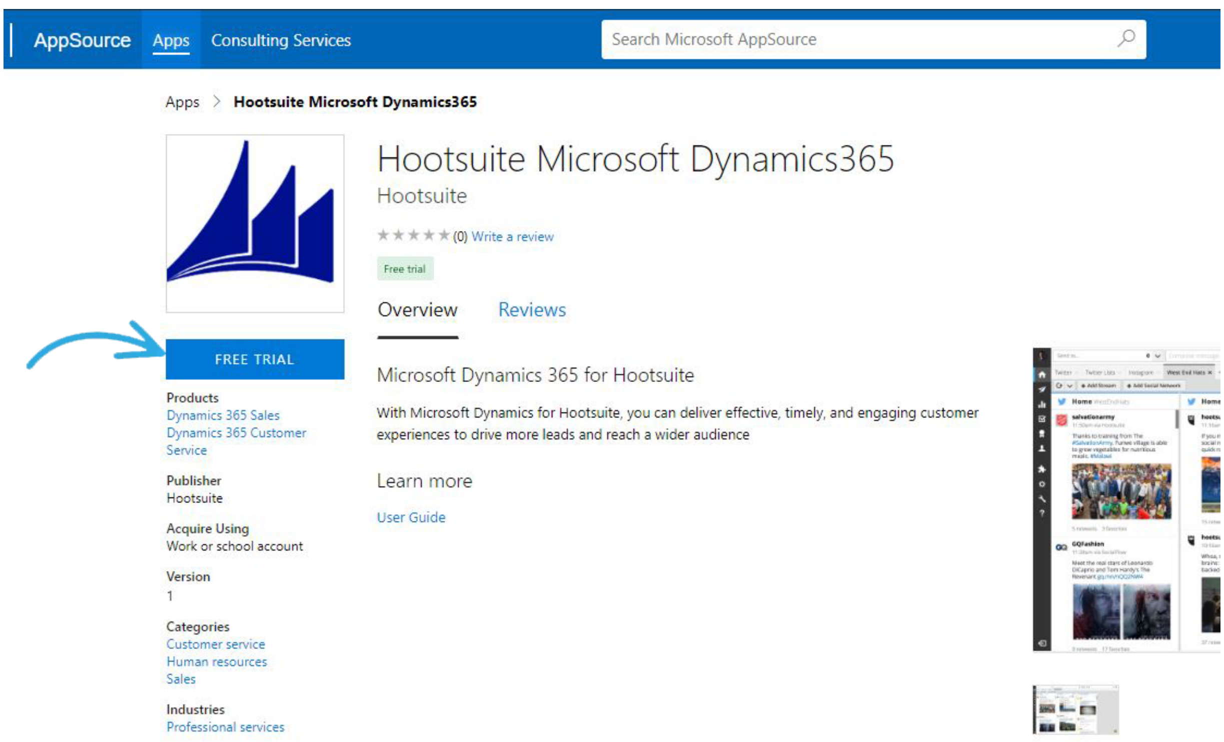
Among other details, the Microsoft Dynamics integration application allows you to capture a social contact's Twitter or Facebook Username and Id on Lead and Contact entities. Because these are not standard fields for the afore mentioned entities, they must be created before using the application for the first time. You can do this by installing a solution that includes these fields.

These are the fields included in the package

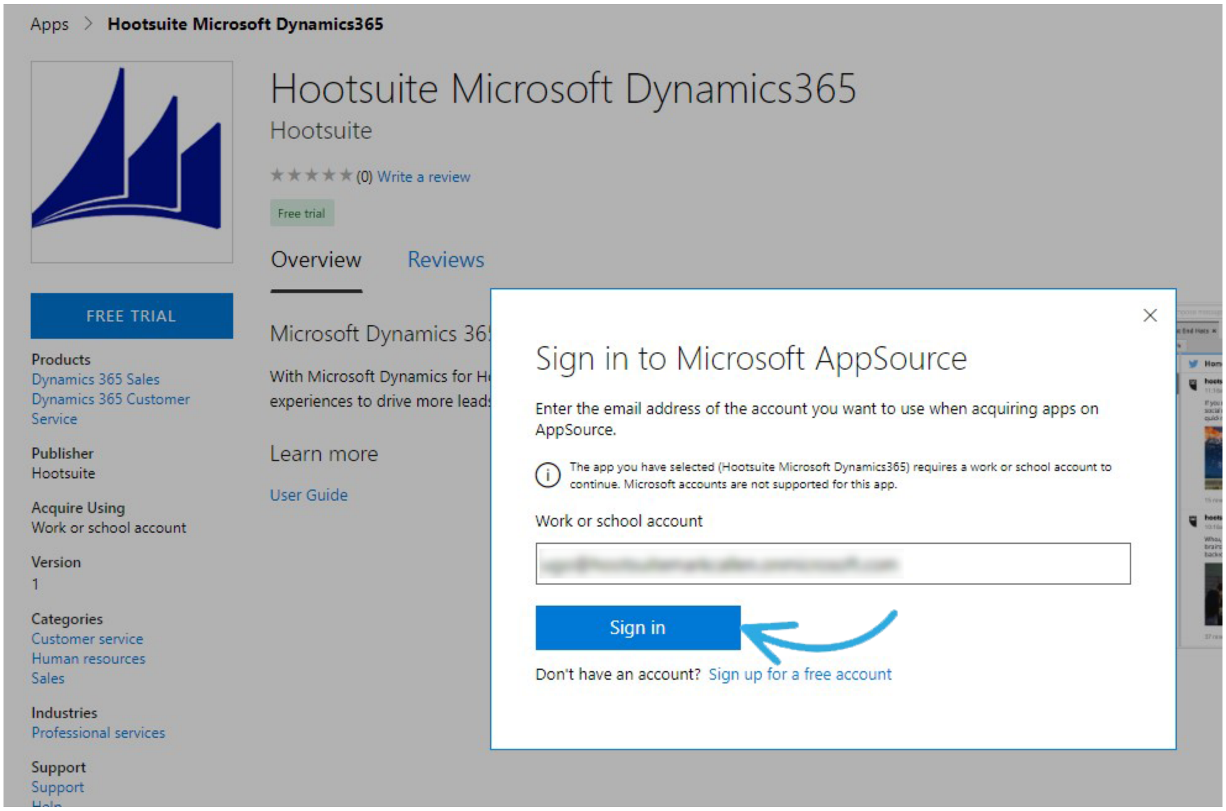
Display Name	Name
Twitter Username	hoot2dyn_twitterusername
Twitter Id	hoot2dyn_twitterid
Facebook Username	hoot2dyn_facebookusername
Facebook Id	hoot2dyn_facebookid

In order to install the package, follow the next steps:

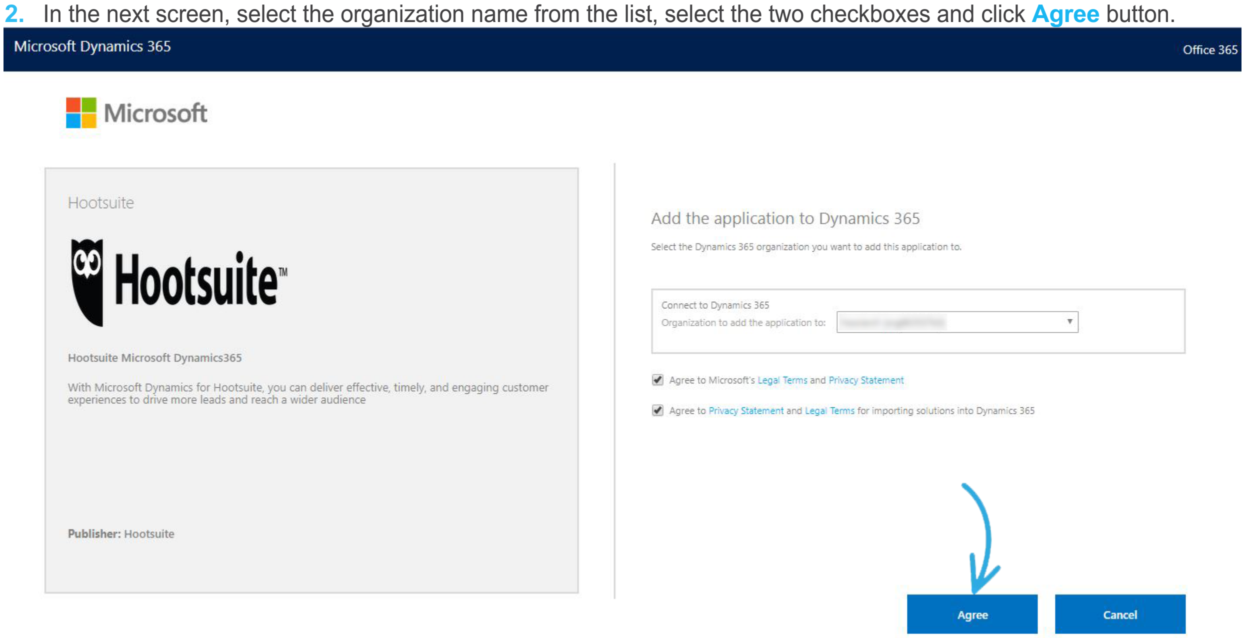
1. In your AppSource page, search for 'Hootsuite Microsoft Dynamics 365'. Once you find the application, click on **Free Trial** button.



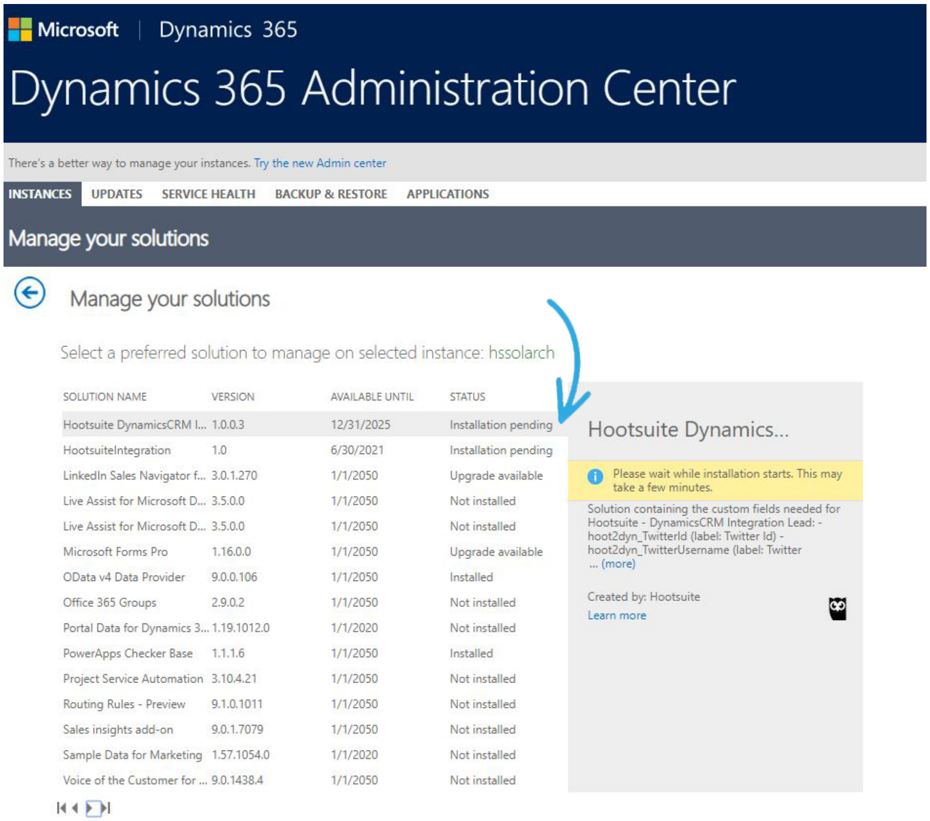
If you have not logged into the AppSource, then login with your Dynamics credentials. Enter your user id and click **Sign in** to enter password in the next screen.



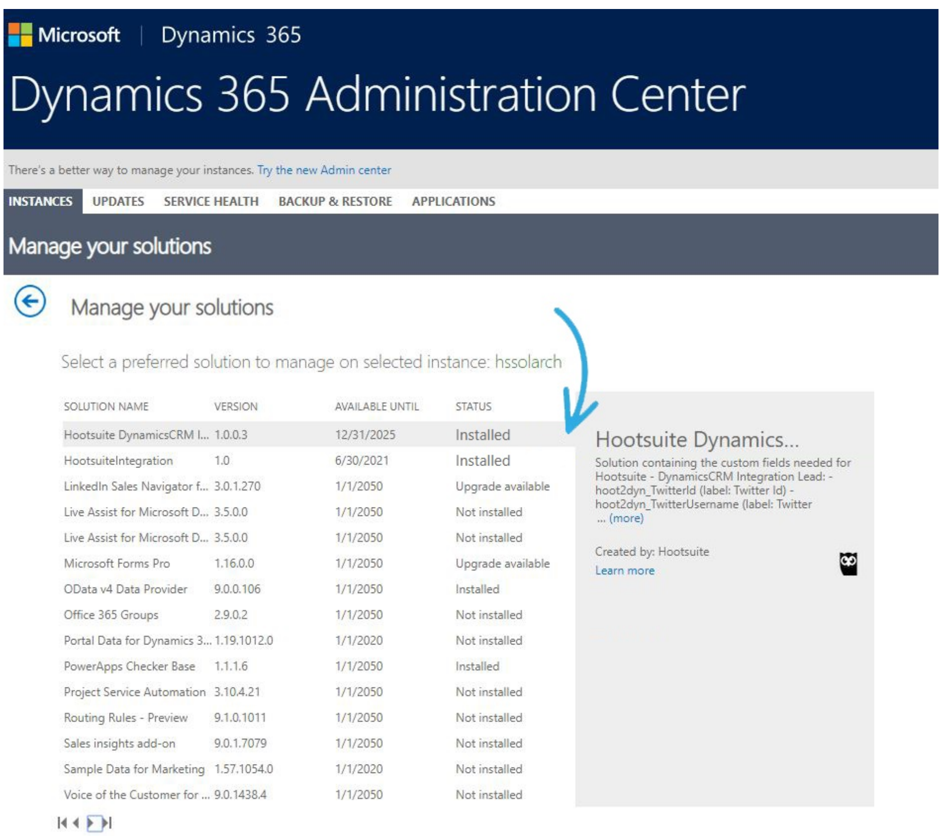
2. In the next screen, select the organization name from the list, select the two checkboxes and click **Agree** button.



The solution, **Hootsuite Dynamics 365 Integration** with version 1.0.0.3 will be displayed in the list of available solutions. The solution will be installed after some time.



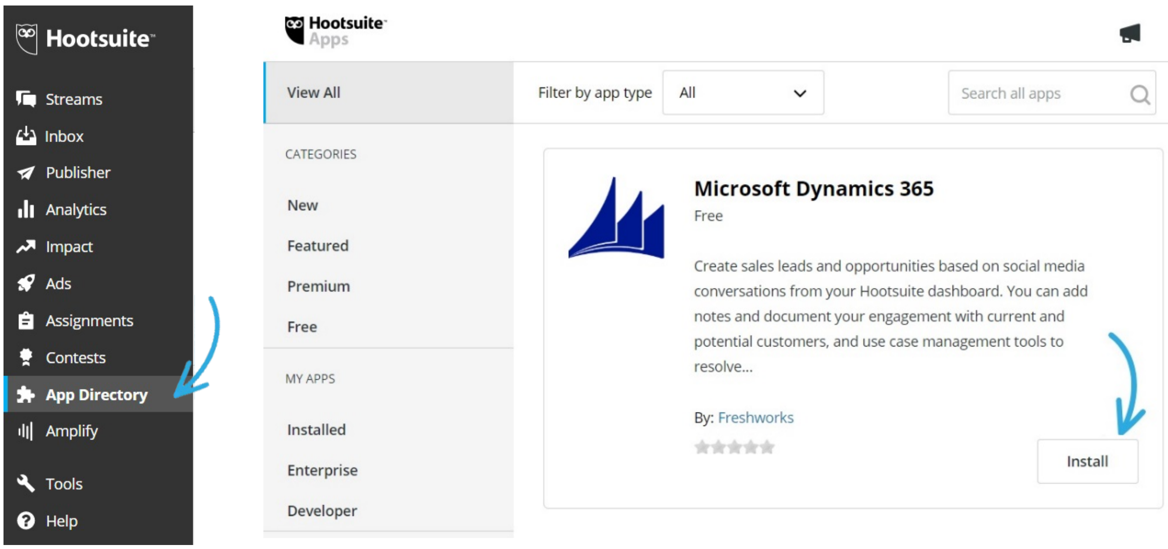
After the solution is installed successfully, the status of the solution will change to Installed



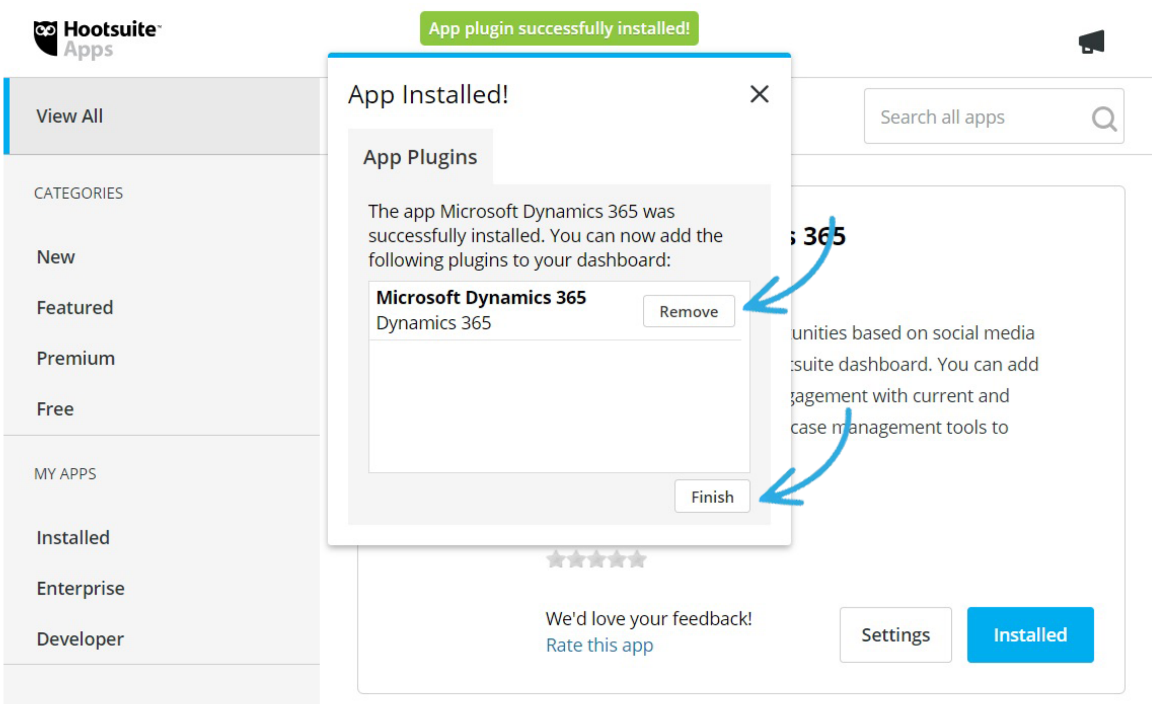
Install Microsoft Dynamics application in Hootsuite

In order to install the Microsoft Dynamics 365 application, follow the next steps:

1. Go to www.hootsuite.com web site.
2. Access the left-side menu and select ‘App Directory’.
3. In the pop-up window that appears select ‘My Apps’ folder and locate Microsoft Dynamics application that you want to install. Click on ‘Install App’ button.



4. From ‘App Plugins’ tab add Microsoft Dynamics 365 Plugin and click ‘Finish’ button.



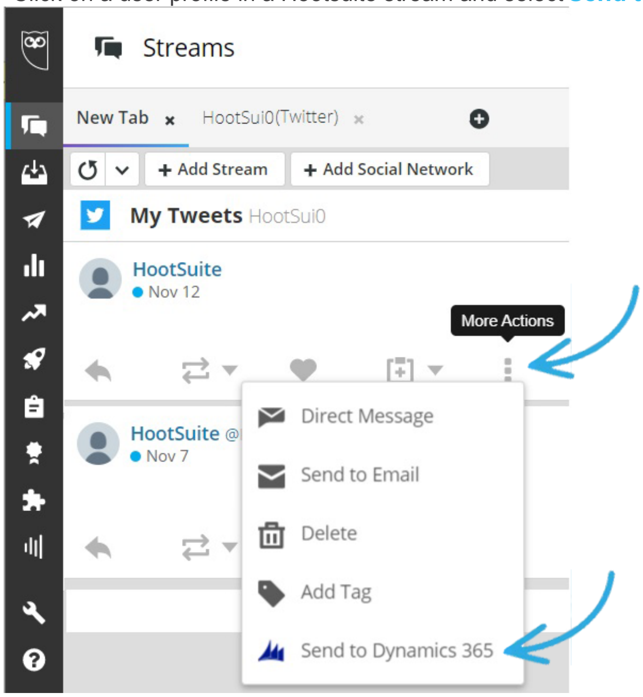
The application is installed and ready to use.

Features

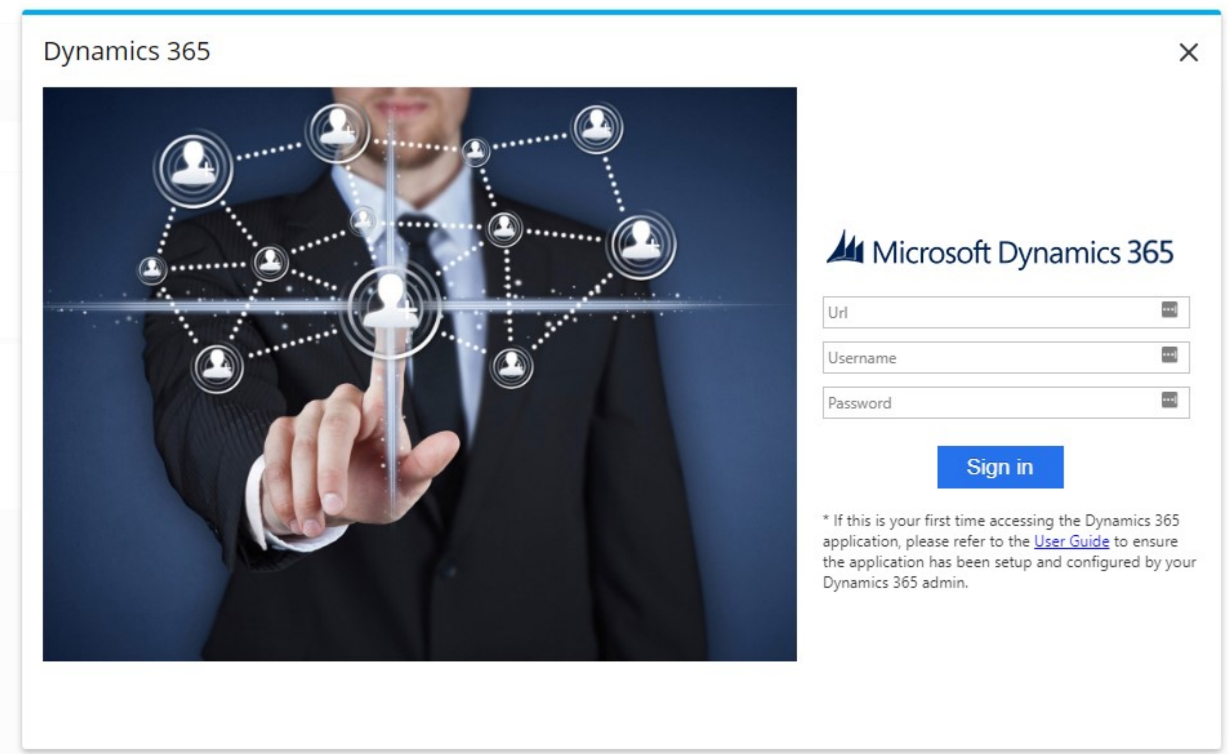
Access Microsoft Dynamics from Hootsuite

In order to be able to capture information in Microsoft Dynamics about social contacts from Facebook and Twitter, first you must log into your Microsoft Dynamics account from Hootsuite Dashboard. You can do this by:

1. Click on a user profile in a Hootsuite stream and select **Send to Dynamics 365** option from the menu.

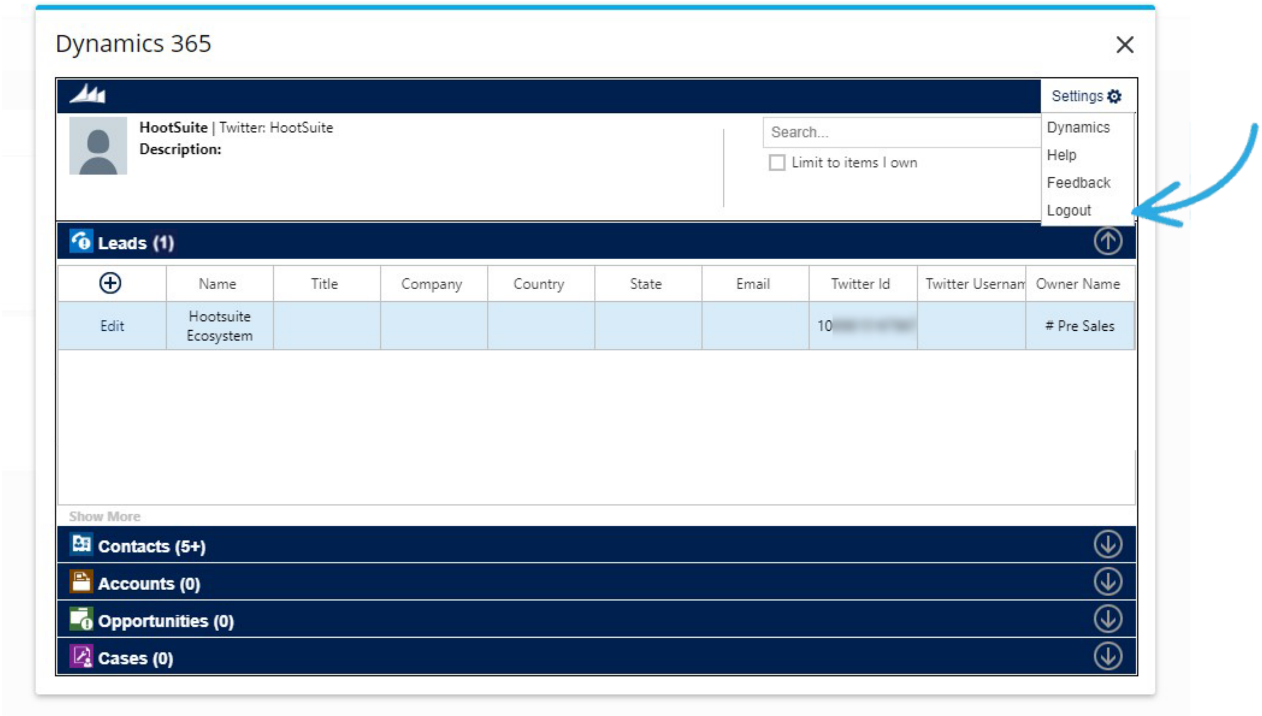


Provide the URL of your Microsoft Dynamics instance (which will be like ‘https://hootsuiteinstance5.crm.dynamics.com’), your username and password and click ‘Sign in’.



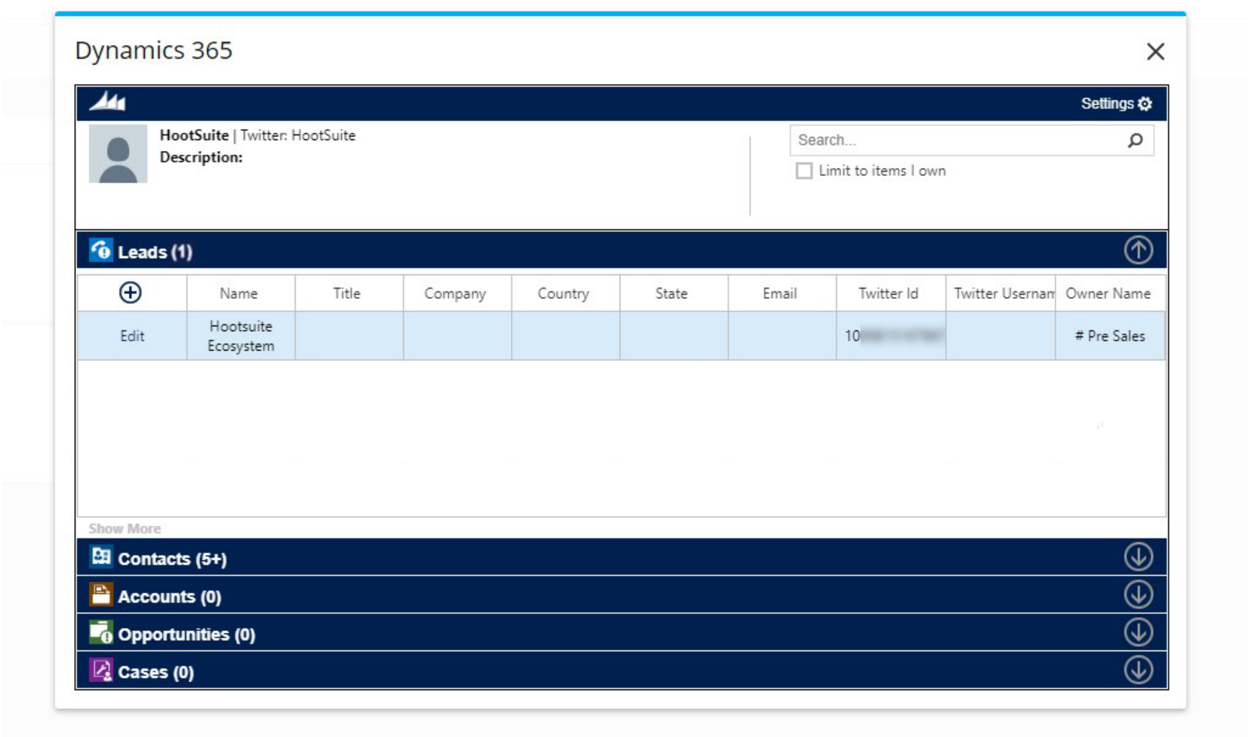
Your user will be authenticated in Microsoft Dynamics and a window containing information related to the selected contact will be then displayed on screen.

To log out from your Microsoft Dynamics account, click on **Settings** and choose **Logout** from the dropdown menu.



Social Contact Screen

All the Leads, Accounts, Contacts, Opportunities and Cases associated with a social contact are displayed here.



Leads section contains all the leads from Microsoft Dynamics that match the selected social contact's First Name and/or Last Name, Facebook/Twitter Username or Facebook/Twitter Id.

In the **Accounts** section are displayed all the accounts whose names match the social contact's name.

Contacts section contains all the contacts from Microsoft Dynamics that match the selected social contact's First Name and/or Last Name, Facebook/Twitter Username or Facebook/Twitter Id.

Opportunities section contains all the opportunities that match the name of the social contact.

Cases section contains all the Microsoft Dynamics cases related to the accounts or contacts in the Accounts and Contacts tabs of the social contact.

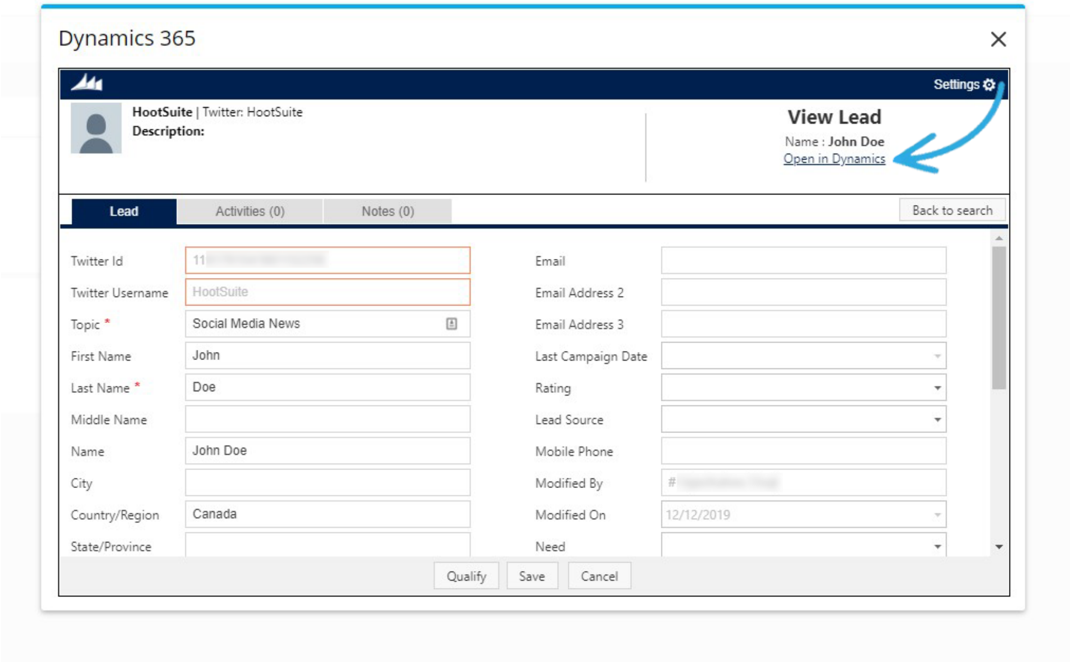
Search for records

You can use the search function to find a specific record on this page, or to filter the records available for a social contact. Bear in mind that the search is conducted only on the records available on the social contact's view. The following criteria are applied when searching

- For **Leads,** the search is conducted on the First Name, Last Name and Company fields
- For **Contacts**, the search is conducted on First Name, Last Name and related Account's Name fields
- For **Opportunities**, the search is conducted on Opportunity Name and related Account's Name fields
- For **Accounts**, the search is conducted on the Account Name and parent Account's Name fields
- For **Contacts**, the search is conducted on related Contact's First and Last Name and on related Account's Name fields

If your Microsoft Dynamics user has the permission to view all records for at least one of the Account, Opportunity, Lead, Case and Contact objects, you can limit the search to the items you own by checking the Limit to items I own checkbox.

Detailed view



By clicking the Edit link (or View, depends on the permissions your Microsoft Dynamics has on the Account, Contact, Lead, Case and Opportunity objects, see the Note below) on the left of a record, the detailed view of that record will open.

All the fields that are accessible to your Microsoft Dynamics user will be displayed here. If there are Activities and Notes logged on the record, they will be displayed in the **Activities** and **Notes** tabs.

To open a new window with the Microsoft Dynamics detail page of the record, click the **Open in** Dynamics link. To go back to the main social contact screen, click the **Back to Search** button.

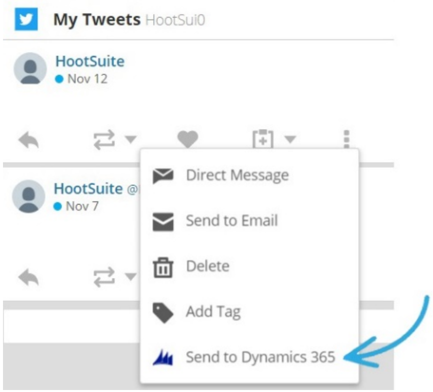
Note: The **Edit** link will appear if your Microsoft Dynamics user has the **Edit** permission on that object (Contact, Lead, Account, Case and Opportunity). If the user has only the View permission, the **Edit** link will be replaced by the View link.

Leads Capture

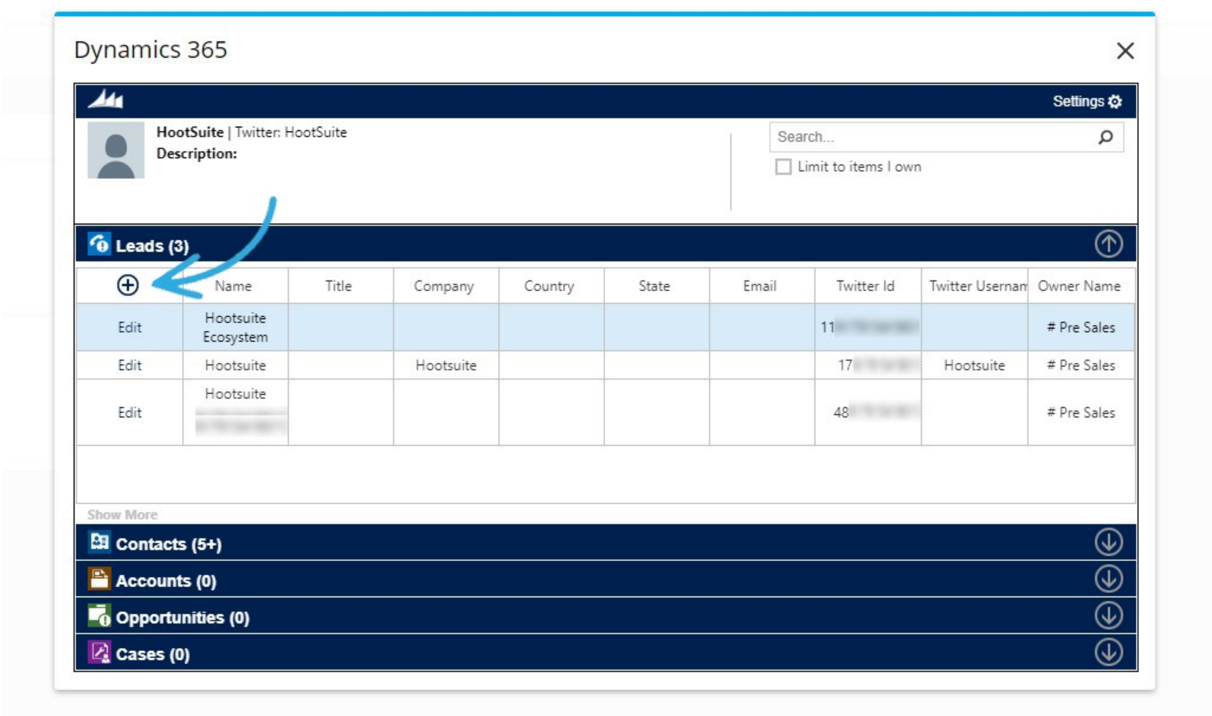
The app provides the option to capture information about any Twitter or Facebook social contact in your Hootsuite stream. In Microsoft Dynamics, the details about the selected social contact can be captured in the lead object.

Create New Lead from Social Contact

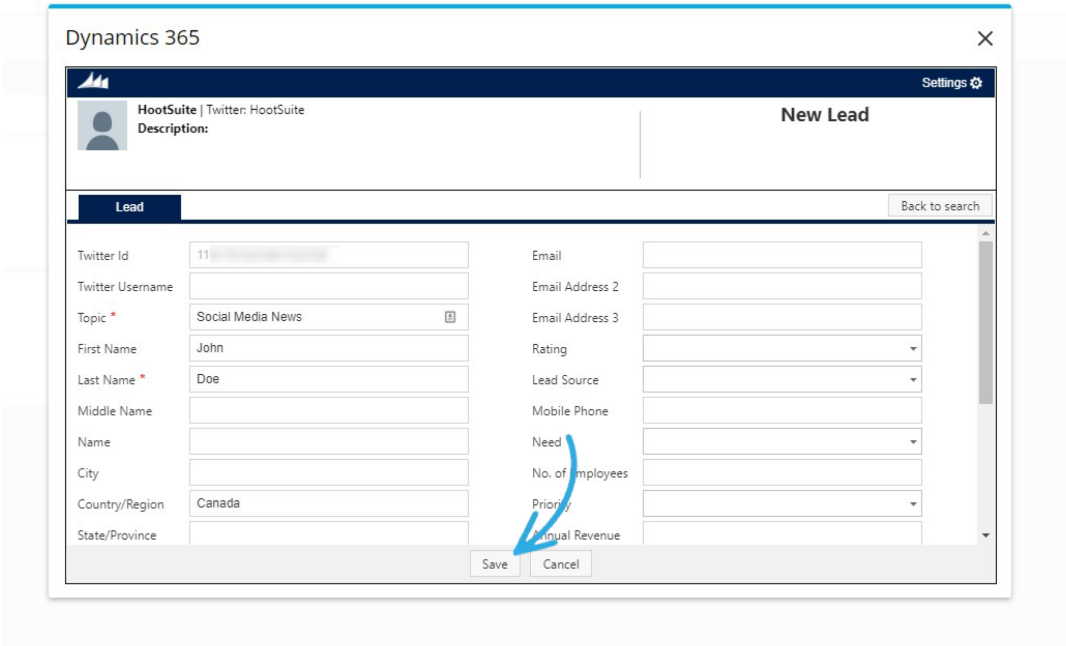
1. From the Hootsuite stream, click on the desired social contact's profile and select the 'Send to Dynamics 365' menu option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the Microsoft Dynamics option from the More menu of the social message left by the contact.



2. Expand the Leads tab and click the '+' button to launch the lead creation wizard.



3. The First and Last Name, Description fields are automatically filled in. First and Last Name can be edited. Fill in / edit the rest of the fields and click **Save** to create a Lead record in Microsoft Dynamics for the social contact.

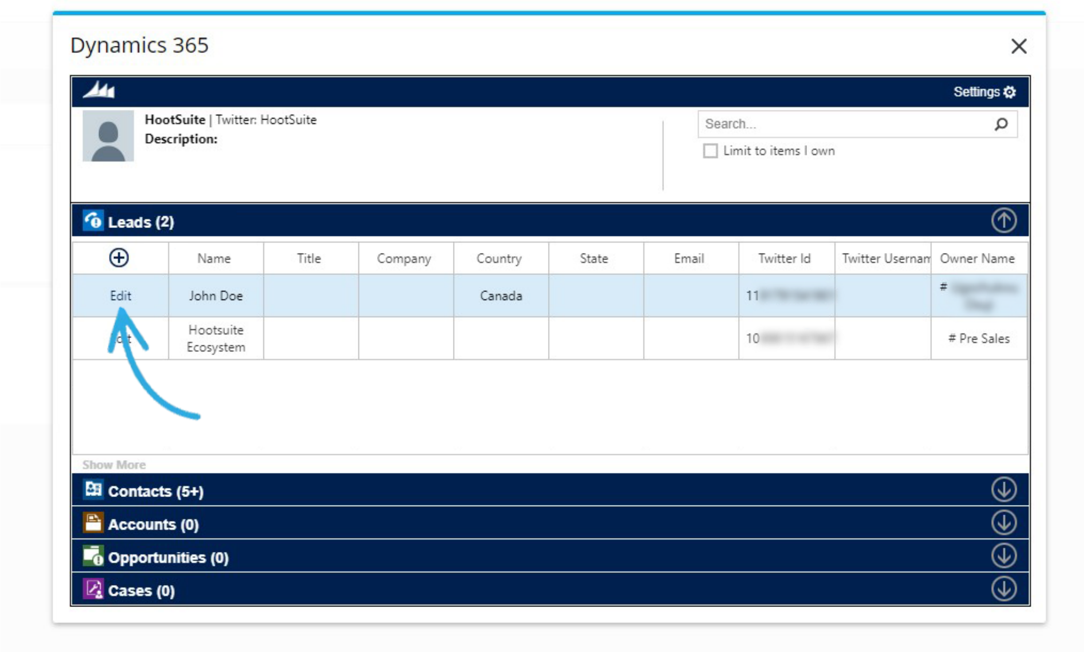


View/Edit Lead

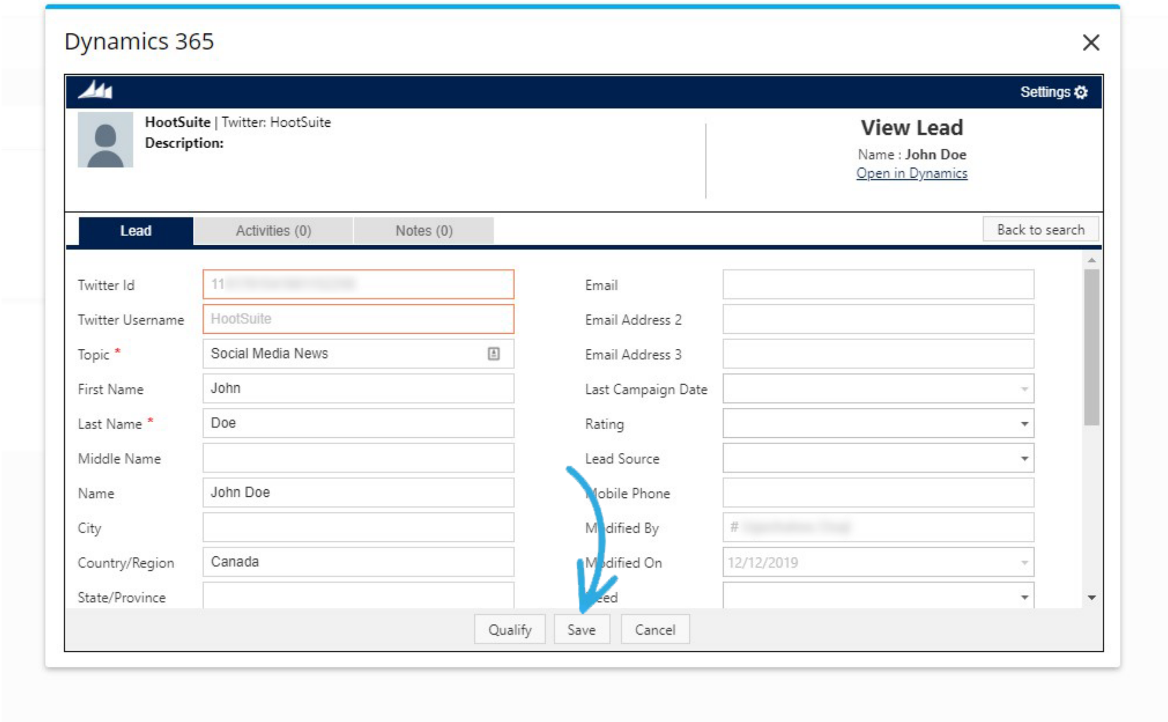
All the leads associated with the selected social contact can be found in the Leads section. If your Microsoft Dynamics user doesn't have View rights on the Lead object, the Leads section won't be available. In order for a lead record to be displayed here, at least one of the following criteria must be satisfied

- Lead First Name and Last name must match the social contact's full name
- Twitter/Facebook username on the lead must match the Facebook/Twitter username of the social contact;
- Twitter/Facebook Id on the lead must match the Facebook.

To view and edit details about a lead, expand the Leads tab and click on the **Edit** link on the left of the desired lead.



A detailed view of the selected lead will be displayed



The Twitter/Facebook Id and Username fields are highlighted in green because the username and id of the social contact are similar with those on the lead.

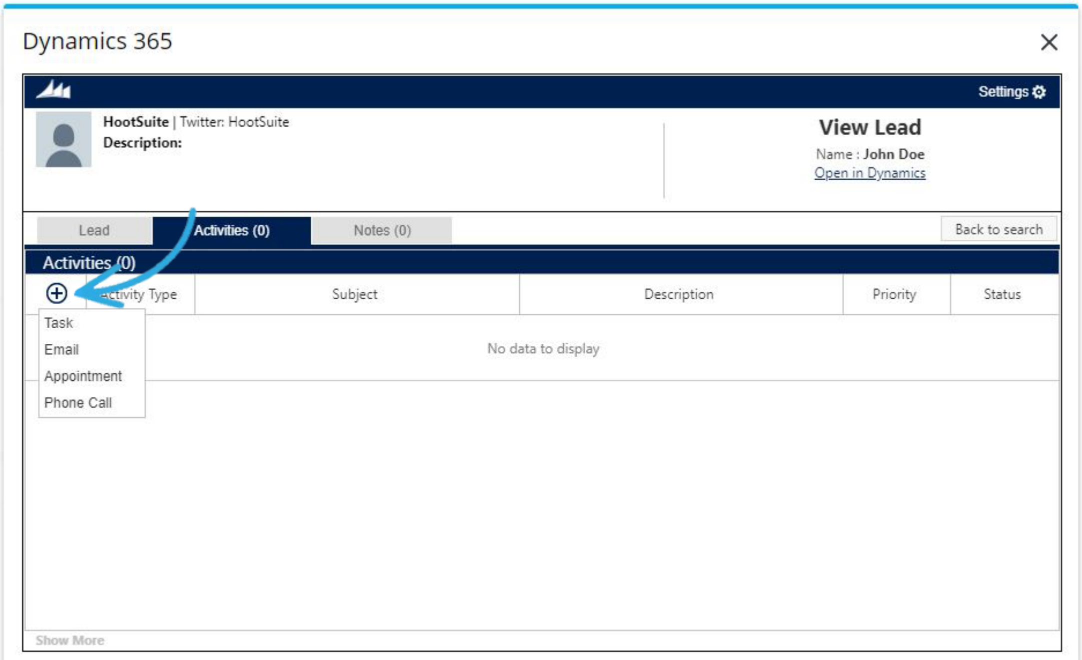
If the social contact's username and id aren't the same as the ones on the selected lead, a Save option is presented. By clicking the **Save** button, the lead is updated with the selected social contact's data.

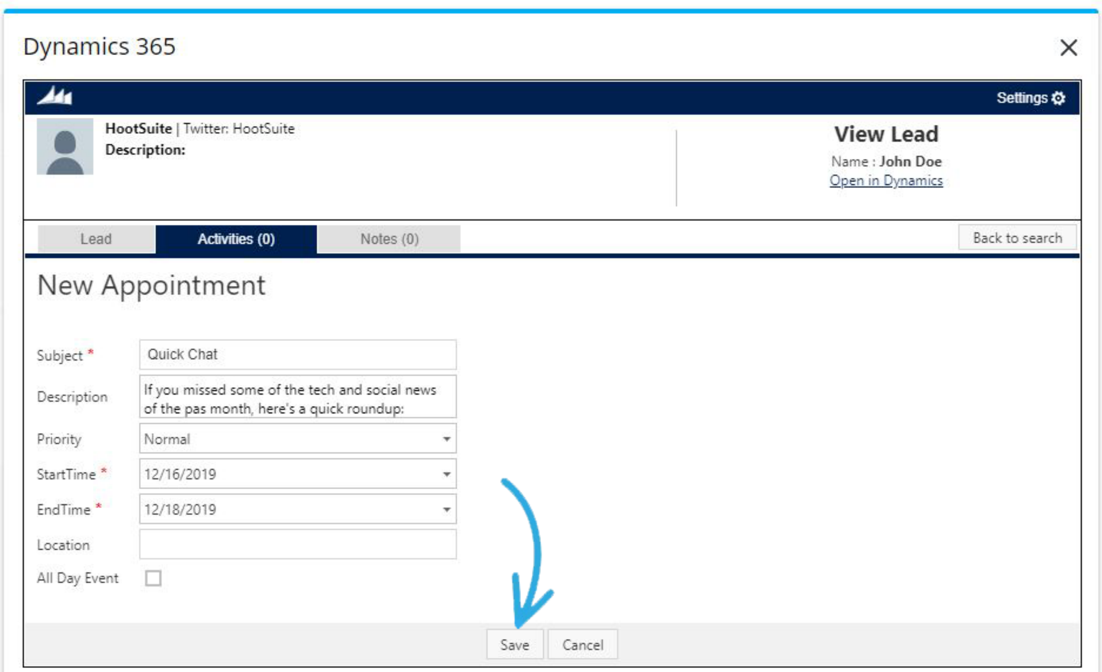
To edit information on a lead, click on the desired field and type the new value. Attention, the greyed-out fields are not editable. When finished editing, click **Save** to update and save the lead. If your profile doesn't have the Edit permission on the Lead object, then the Edit link will be replaced by the View link in the grid view and all the fields will be greyed out in the detailed view.

Notes and Activities

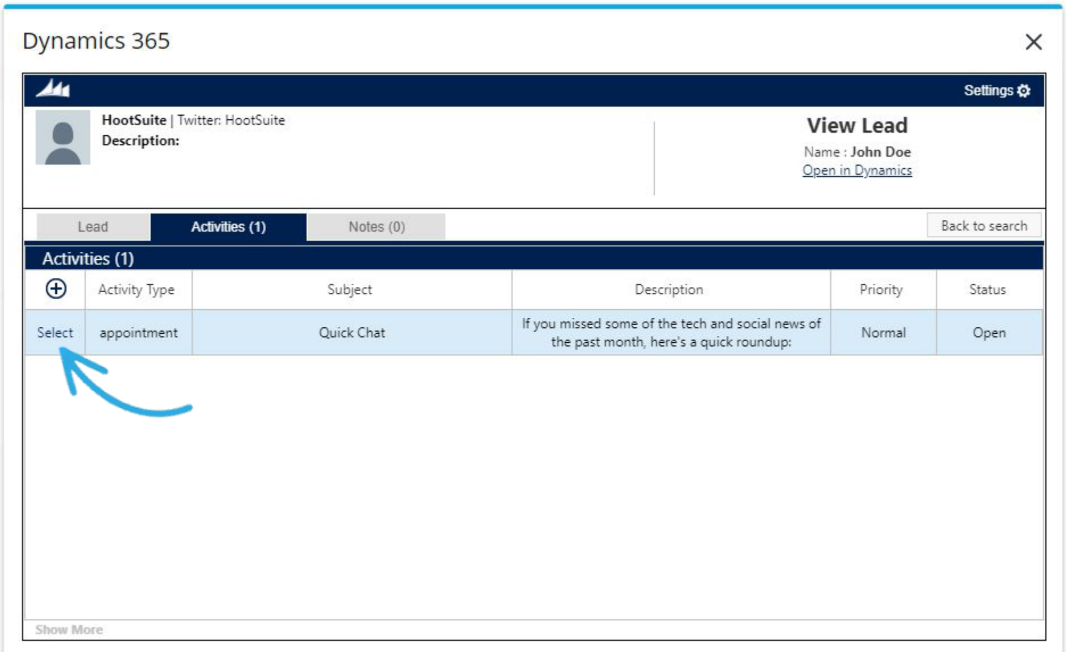
From the lead detail screen, you can also view and plan Activities for the selected lead or you can view or log Notes. To close the detailed view and go back to the main screen, click the **Back to search** button.

To plan an activity for the lead, access the **Activities** tab and click the '+' button. Select what type of activity do you want to create, fill in the fields and Save the activity.

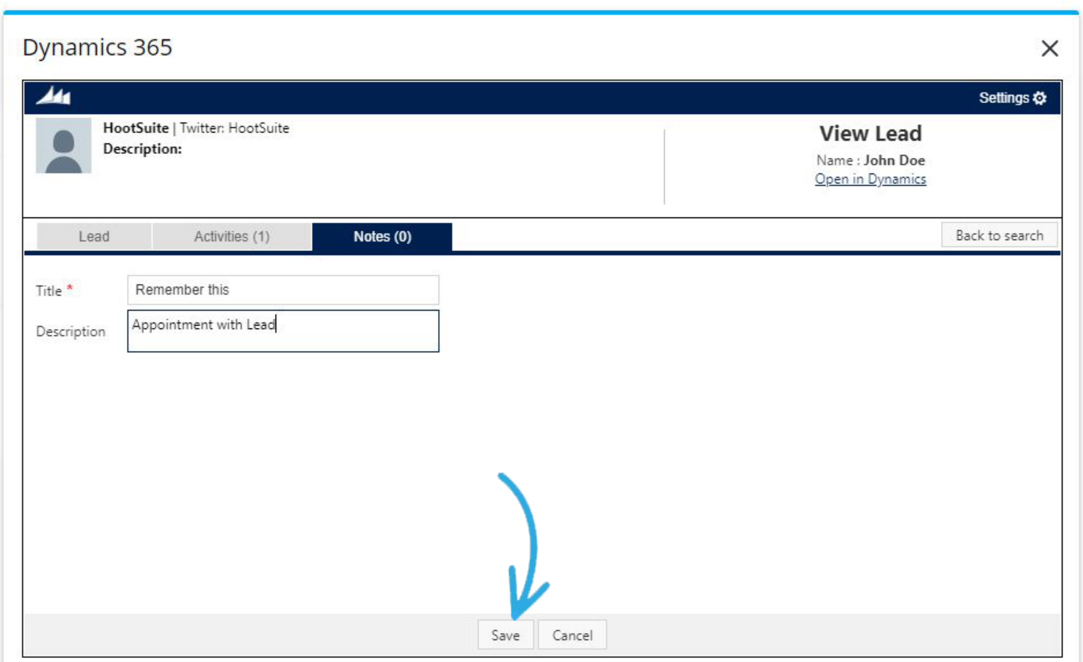




To view an Activity, access the Activities tab and click the Select link on the left of the desired activity from the list.



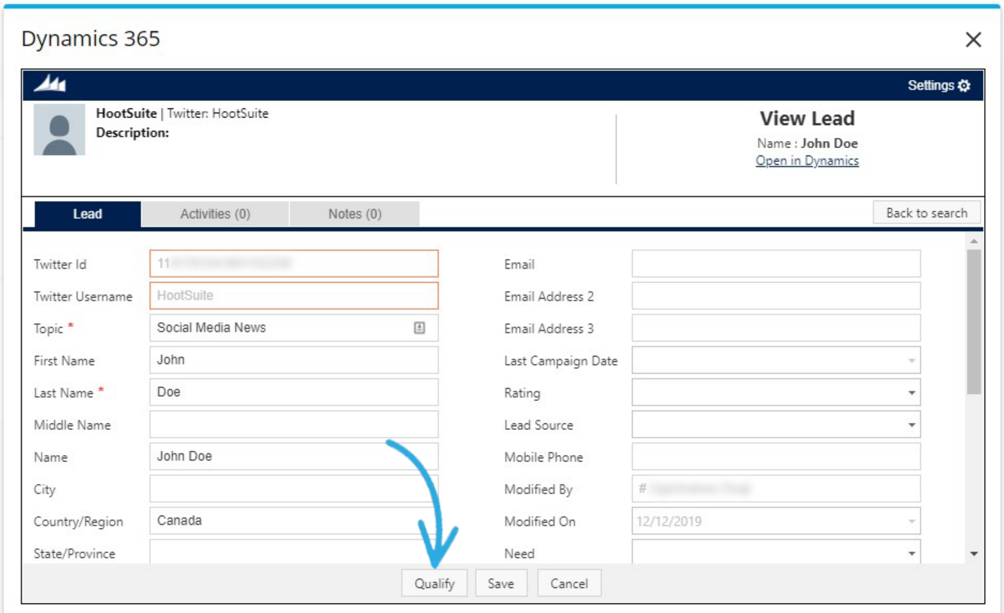
To log a Note on the selected Lead, access the Notes tab and click '+' button.



Qualify Lead

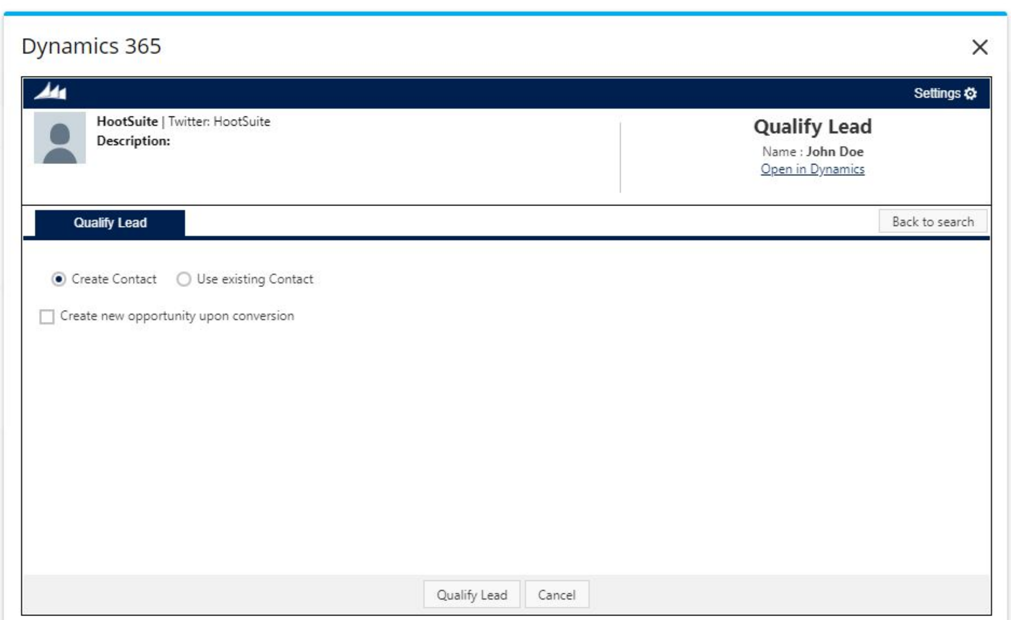
In Microsoft Dynamics, when a lead is qualified it can be converted to a contact and, optionally, an opportunity can be created. Using the integration app, you can qualify a lead directly from Hootsuite dashboard by following the next steps:

1. You can qualify a lead by clicking the Qualify button in the detailed view of the lead.

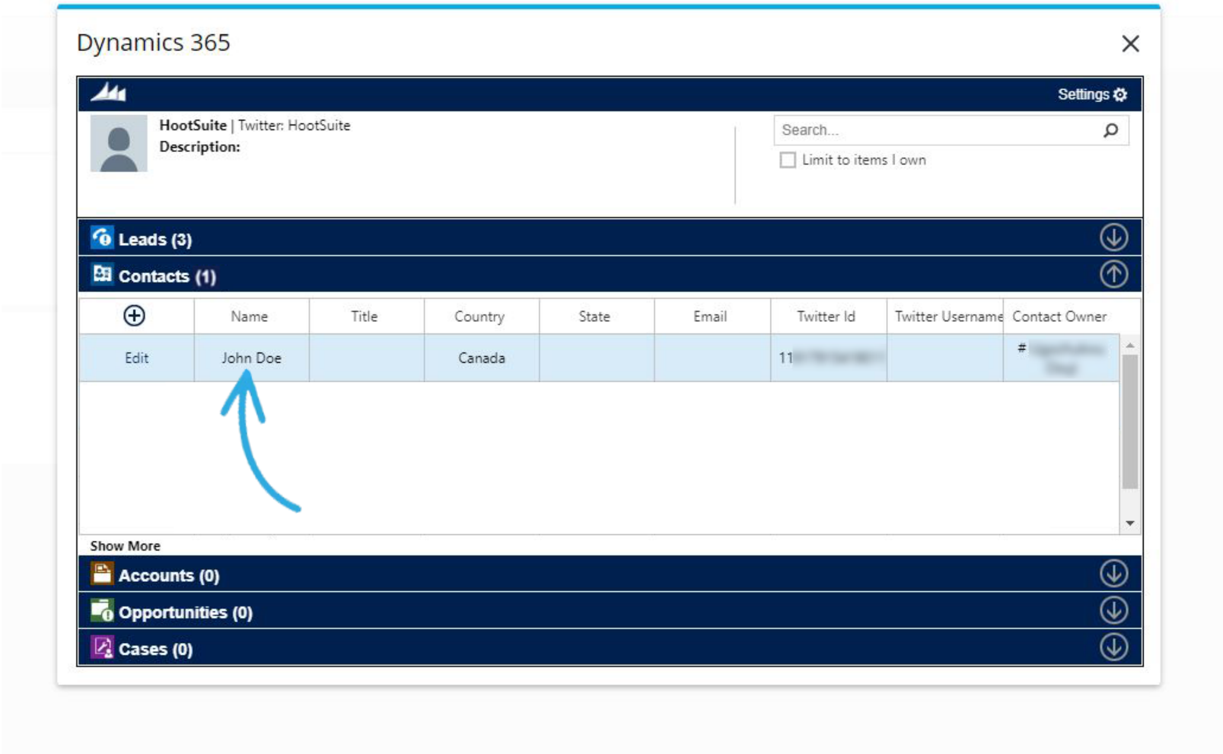


2. The conversion wizard is displayed on screen. Fill in the required information and click Qualify Lead

   - **Use existing Contact** – select this option if you want to assign the lead to an already existing contact.
   - **Create Contact** – A new contact will be created from the lead. This contact name will be the Name of the lead.
   - **Create a new opportunity upon conversion** – check this checkbox if you want a new opportunity to be created.



3. After the conversion, the Lead will disappear from Microsoft Dynamics and from Leads tab of the social contact and a new Contact will be displayed.

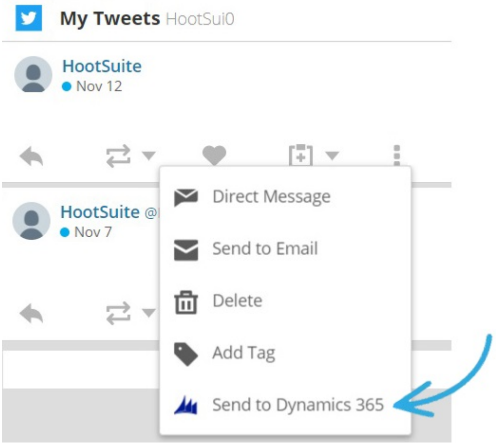


Contacts Capture

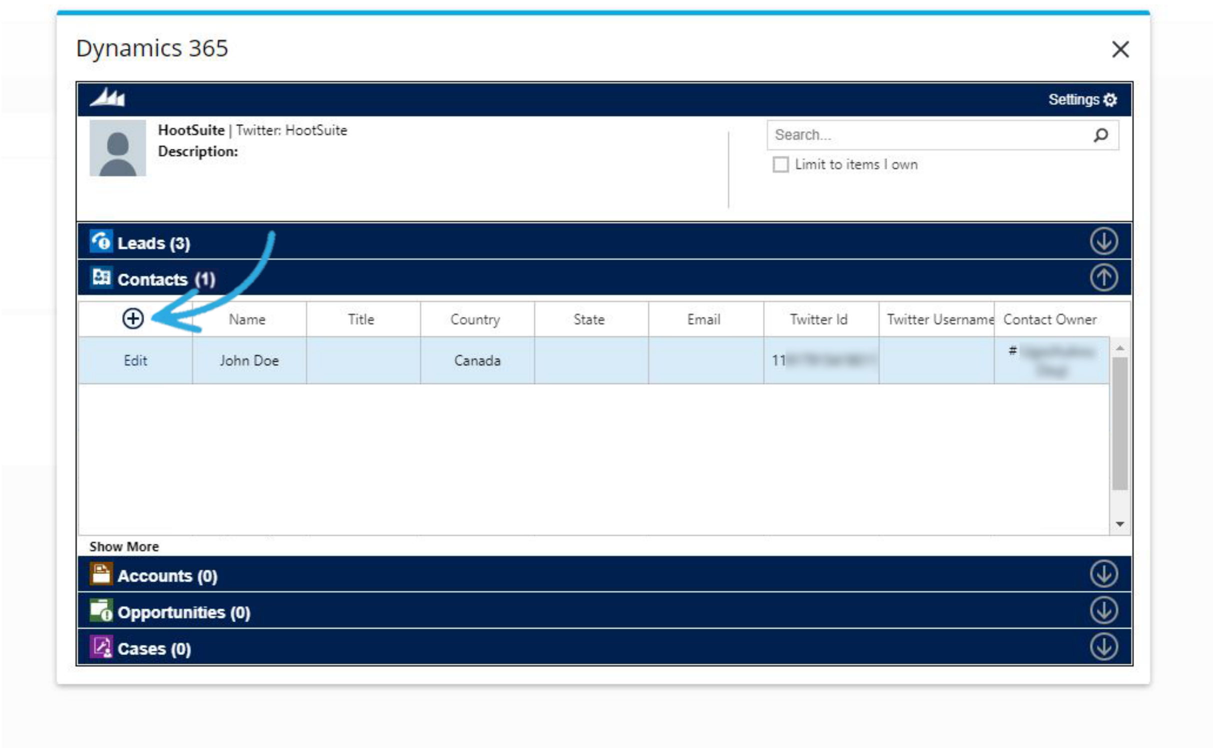
The app provides the option to capture information about any Twitter or Facebook social contact in your Hootsuite stream. In Microsoft Dynamics, the details about the selected social contact can be captured in the contact object apart from the Lead object.

Create New Contact from Social Contact

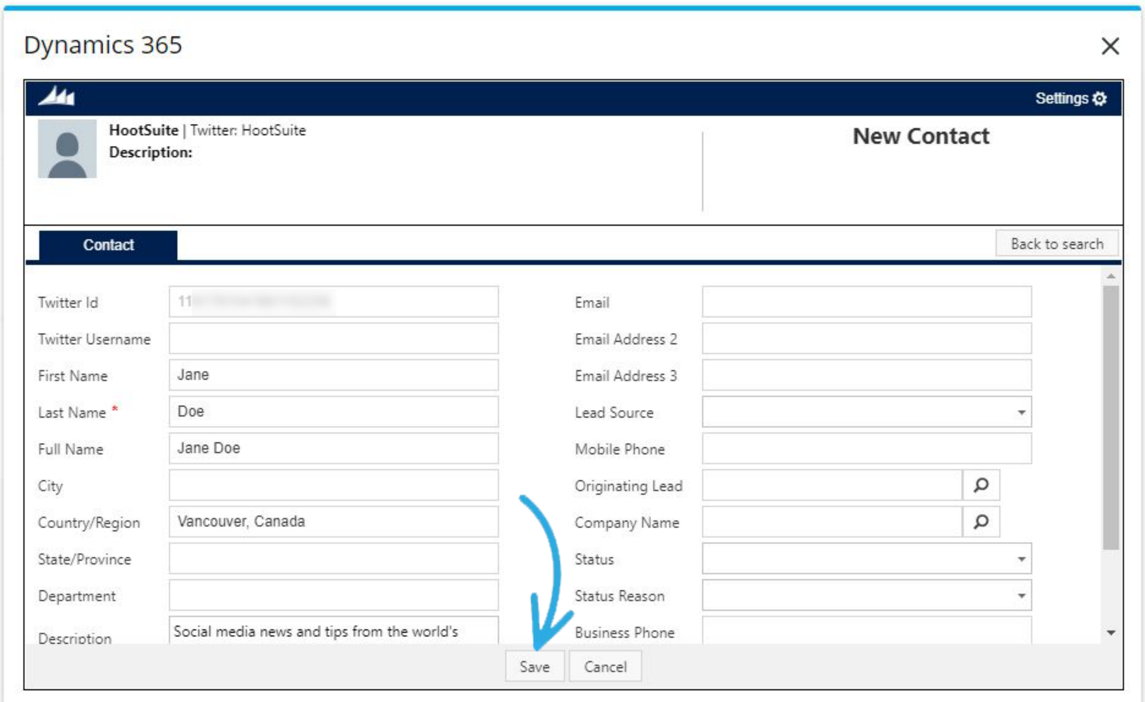
1. From the Hootsuite stream, click on the desired social contact's profile and select the Dynamics option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the 'Send to Dynamics 365' option from the More menu of the social message left by the contact.



2. Expand the Contacts tab and click the '+' button to launch the contact creation wizard



3. The First Name, Last Name and Description, Twitter/Facebook Username and Twitter/Facebook Id fields are automatically filled in. Description, First and Last Name can be edited. Fill in/edit the rest of the fields and click **Save** to create a Contact record in Microsoft Dynamics for the social contact. In order to associate a contact with an account fill in Company Name field.



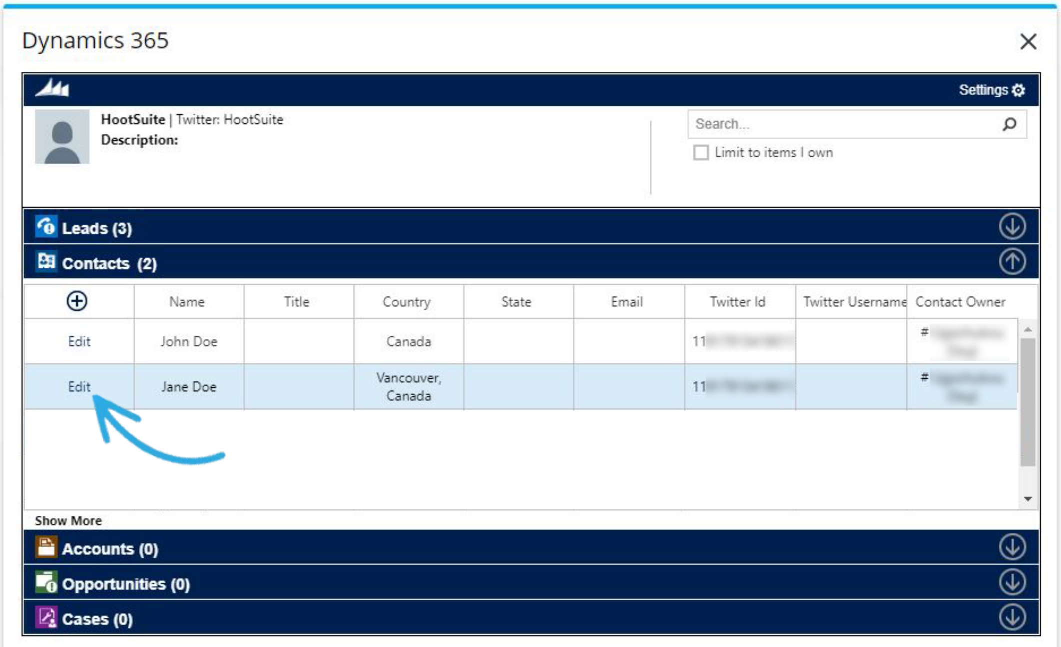
View/Edit Contact

All the Microsoft Dynamics contacts associated with the selected social contact are displayed in the Contacts section. If your Microsoft Dynamics user doesn't have View rights on the Contact object, this section won't be available.

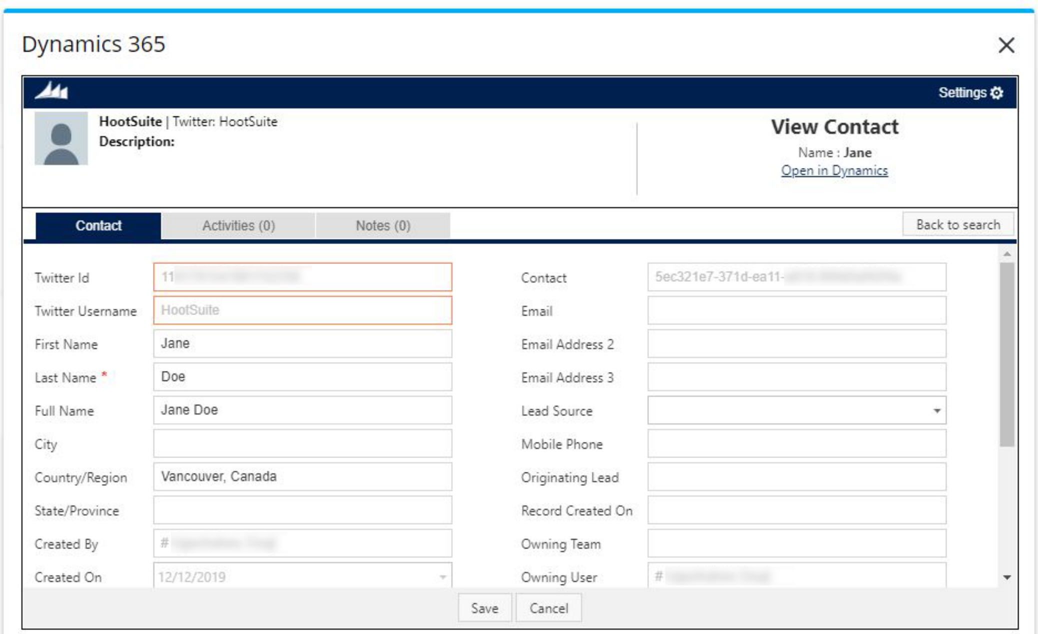
In order for a contact to be displayed here the following criteria must be fulfilled

- Microsoft Dynamics contact First Name and Last Name must match the social contact's full name
- Twitter/Facebook username on the Microsoft Dynamics contact must match the Facebook/Twitter username of the social contact;
- Twitter/Facebook Id on the Microsoft Dynamics contact must match the Twitter/Facebook id of the social contact.

To view and edit details about a contact, expand the Contacts tab and click on the Edit link on the left of the desired contact.



A detailed view of the selected contact will be displayed.



The Twitter/Facebook Id and Username fields are highlighted in green because the username and id of the social contact are similar with those on the contact record from Microsoft Dynamics.

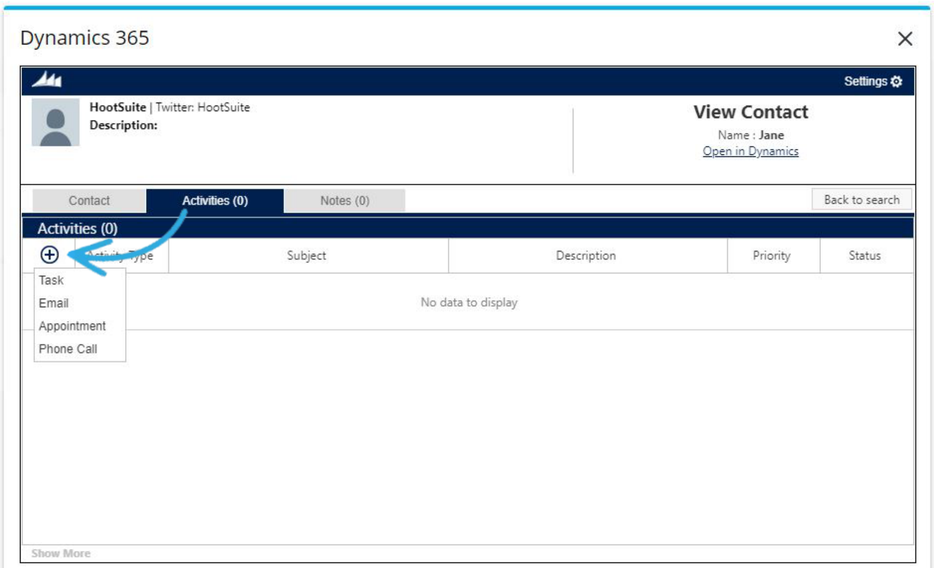
If the social contact's username and id aren't the same as the ones on the selected Microsoft Dynamics contact, a Save option is presented. By clicking the Save button, the Microsoft Dynamics contact is updated with the selected social contact's data.

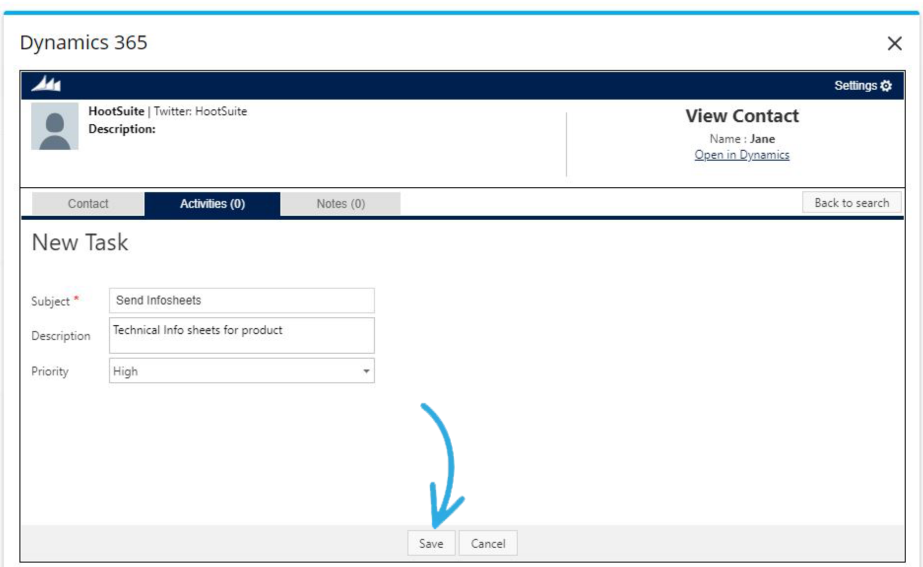
To **edit** information on a contact record, click on the desired field and type the new value. Attention, the greyed out fields are not editable. When finished editing, click **Save** to update and save the contact record. If your profile doesn't have the **Edit** permission on the **Contact** object, then the **Edit** link will be replaced by the **View** link in the grid view and all the fields will be greyed out in the detailed view.

Notes and Activities

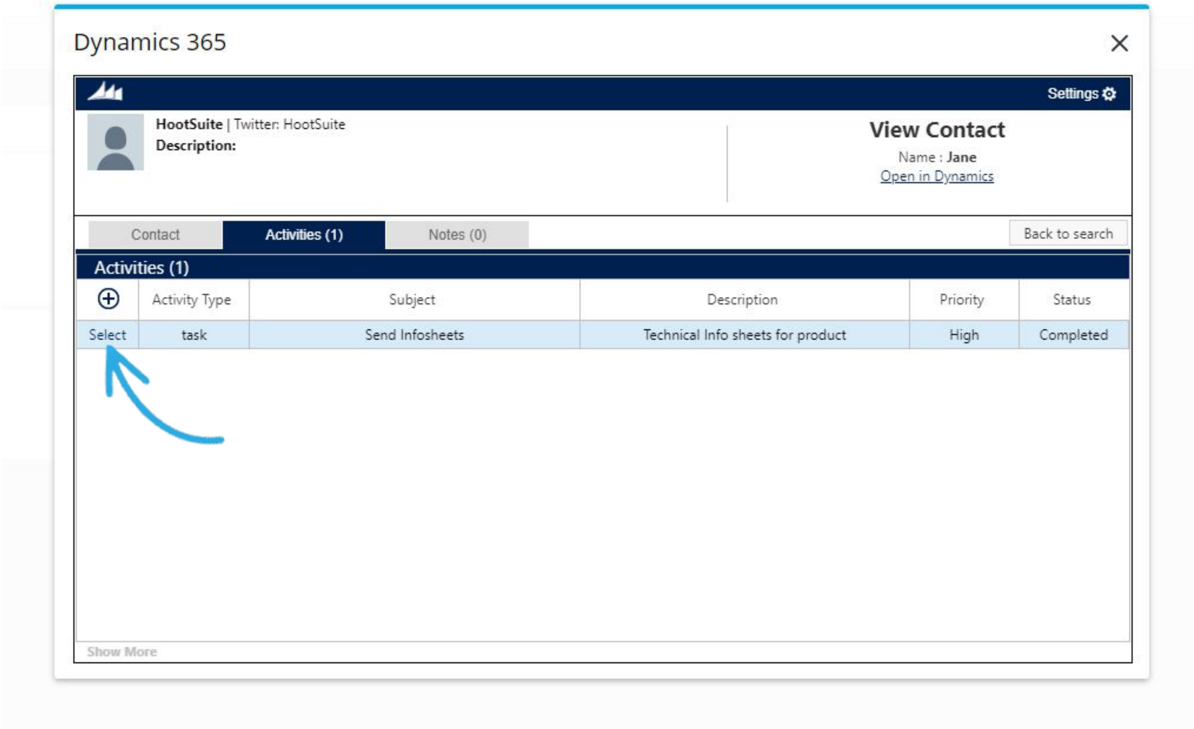
From the contact detail screen, you can also view and plan Activities for the current contact or you can view or log Notes. To close the detailed view and go back to the main screen, click the **Back to Search** button.

To plan an activity for the contact, access the **Activities** tab and click the '+' button. Select the activity type and fill in the fields. Click **Save** and a new activity will be created and associated with the Microsoft Dynamics contact.

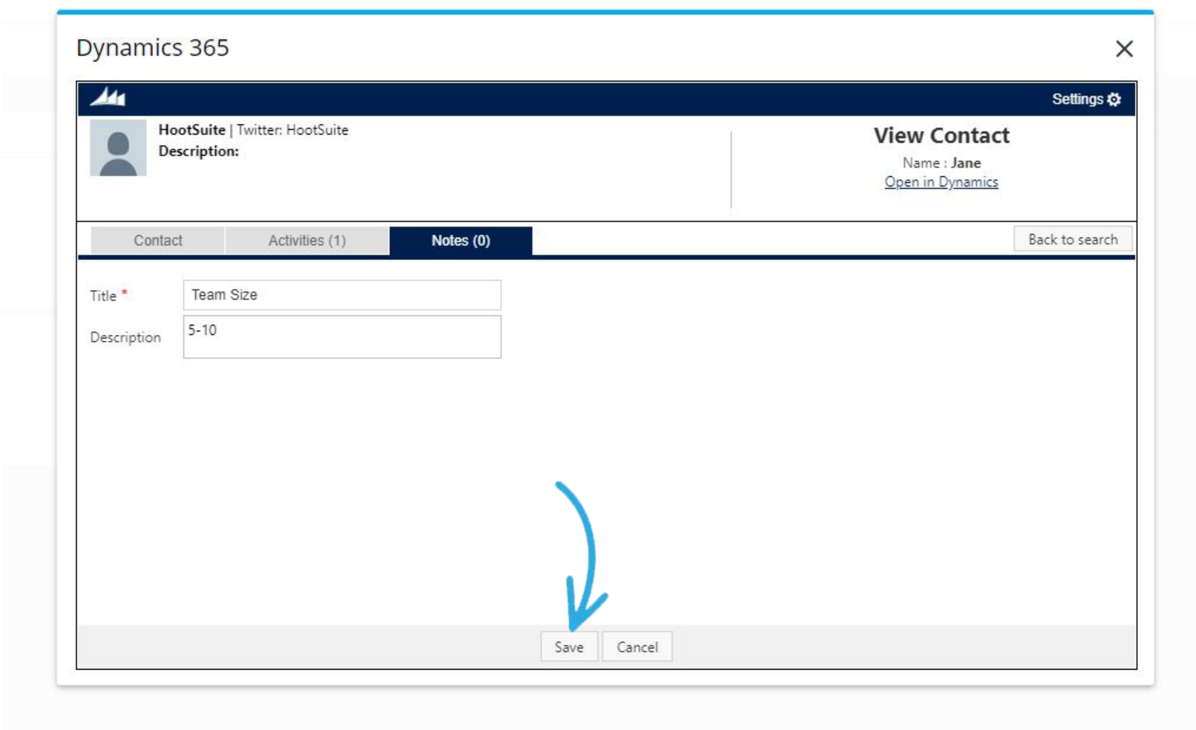




To view an Activity, access the Activities tab and click the **Select** link on the left of the desired activity from the list then click Back to go back to the activities list.



To log a Note on the selected Contact, access the Notes tab and click '+' button.



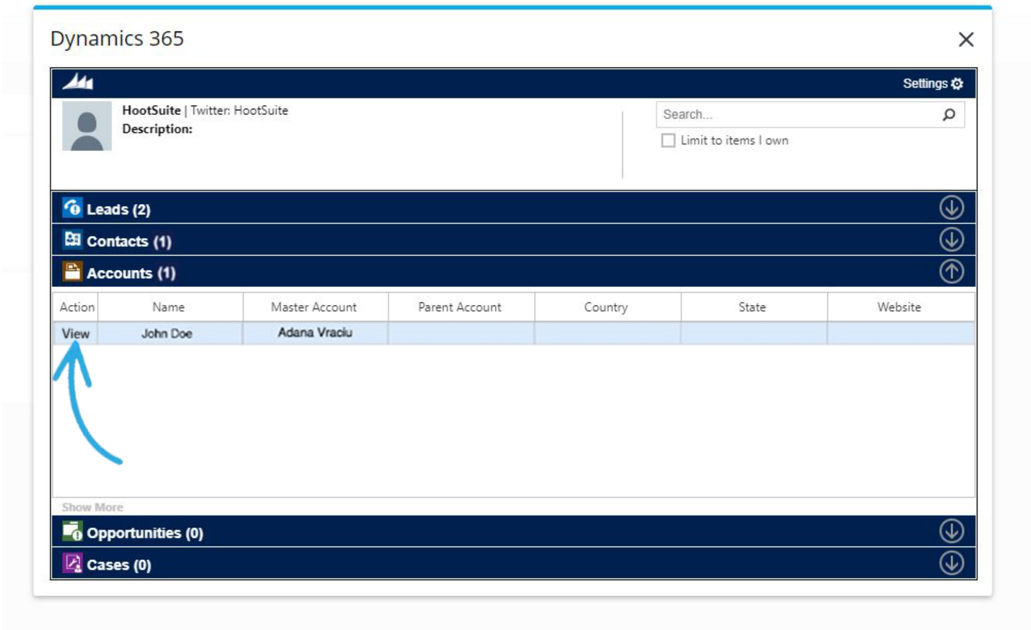
View Accounts

Accounts cannot be manually created in the Microsoft Dynamics integration app.

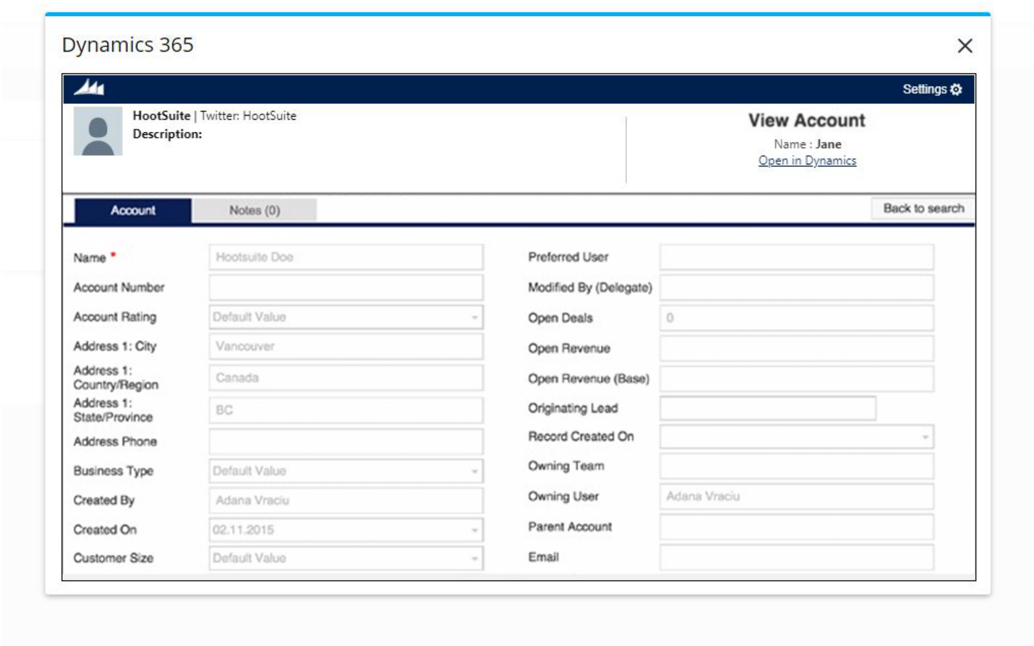
All the Accounts considered relevant for a social contact can be found in the Accounts section. This section won't be available if your Microsoft Dynamics user doesn't have View rights on the Accounts object.

In order for an Account to be displayed here, the Microsoft Dynamics Account name must match the social contact's full name

To view details about an Account, expand the Accounts section and click on the **View** link on the left of the desired account and a detailed view of the selected account will be displayed.

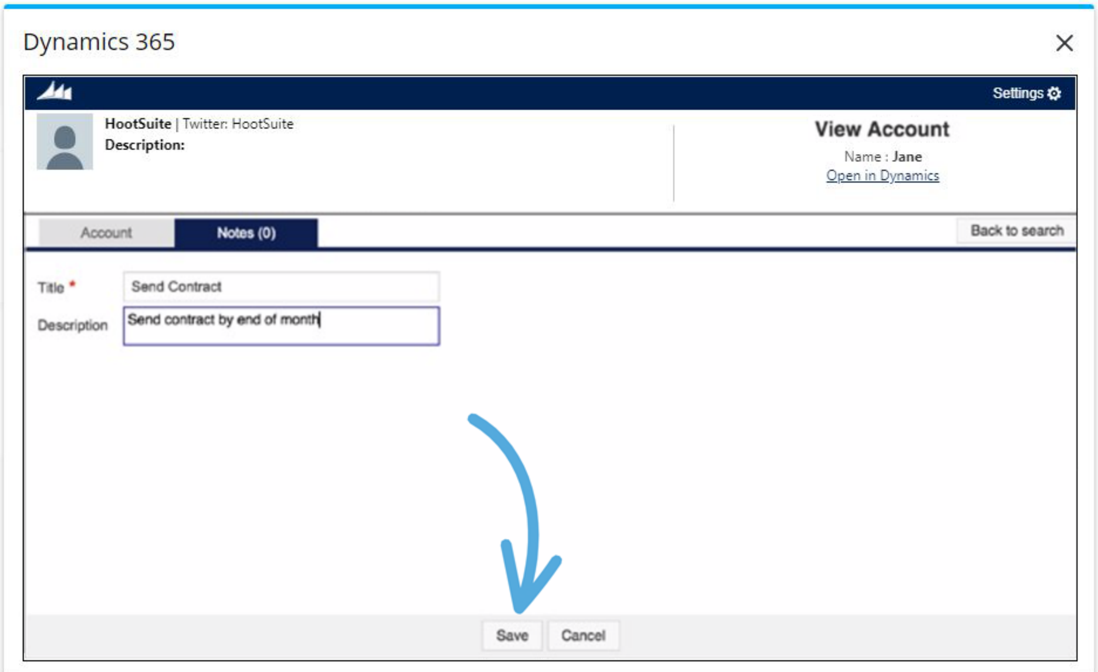


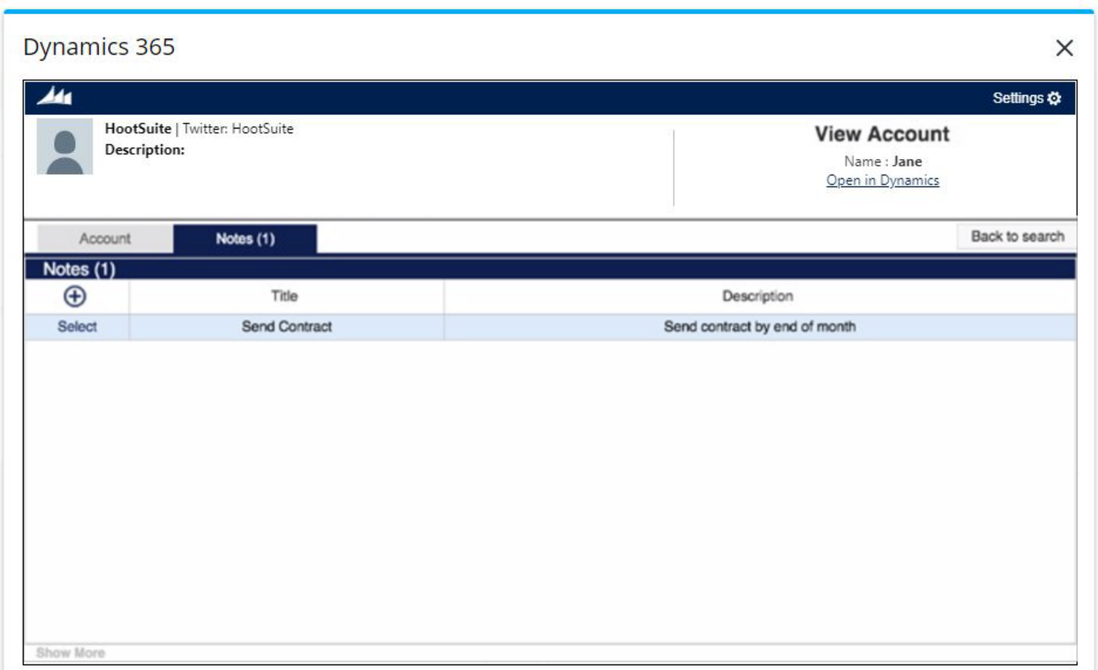
From the Account detail screen, you can also view you can view or log Notes on the account. To close the detailed view and go back to the main screen, click the Back to Search button.



Notes

To log a Note on the selected Account, access the Notes tab and click '+' button.





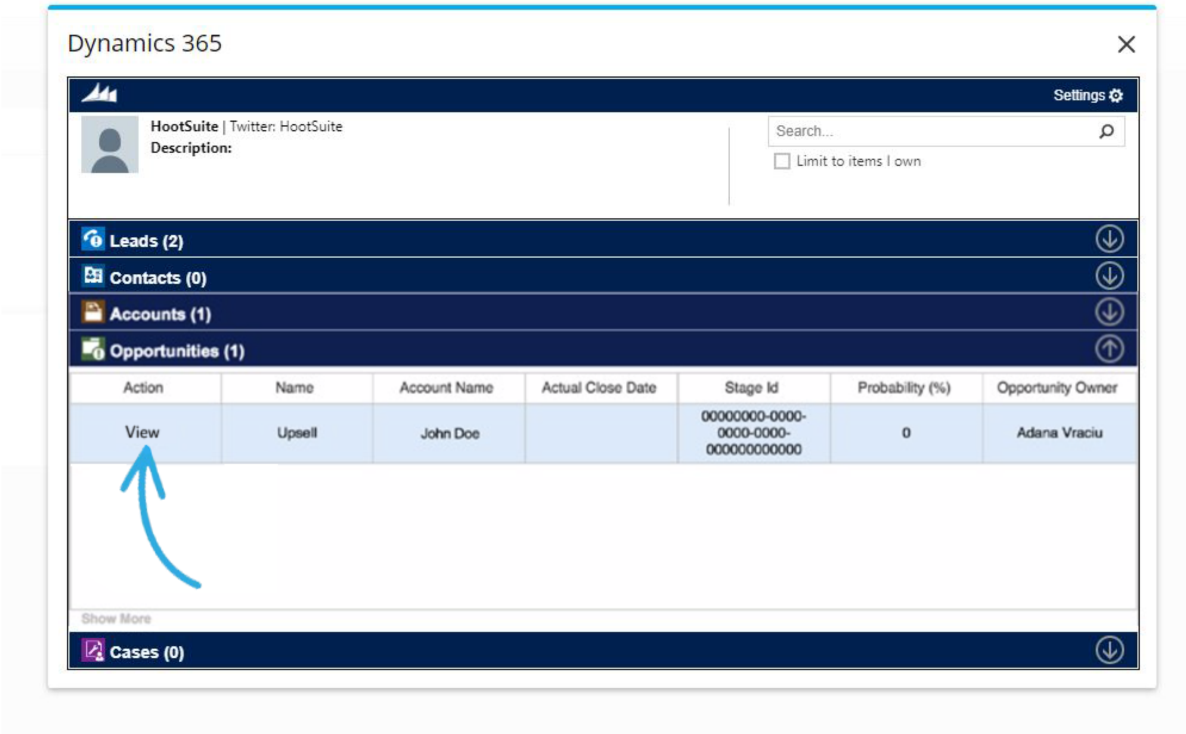
View Opportunities

Opportunities cannot be manually created in the Microsoft Dynamics integration app. They can be created manually in Microsoft Dynamics (and they will be displayed on a social contact's page in the app) or automatically from the app when qualify a lead.

All the Opportunities considered relevant for a social contact can be found in the Opportunities section. The section won't be available if your Microsoft Dynamics user doesn't have View rights on the Opportunity object.

In order for an Opportunity to be displayed here, the Microsoft Dynamics Opportunity name must match the social contact's full name.

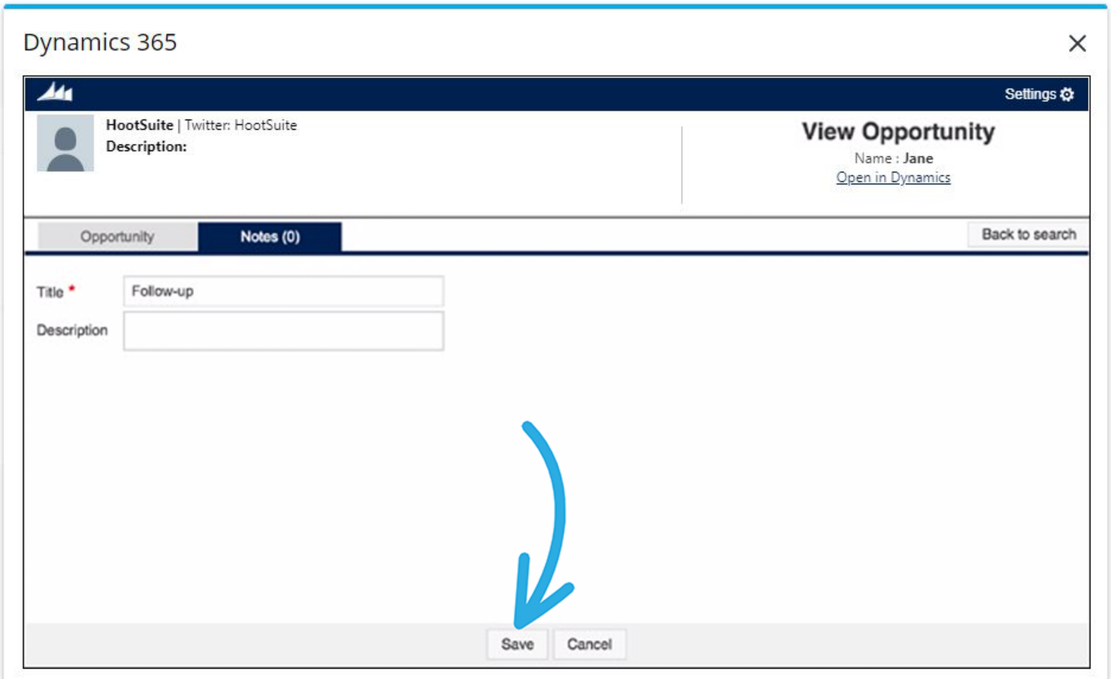
To view details about an Opportunity, expand the Opportunity section, click on the **View** link on the left of the desired record and a detailed view of the selected opportunity will be displayed.



From the Opportunity detail screen, you can also view you can view or log Notes. To close the detailed view and go back to the main screen, click the Back to search button.

Notes

To log a Note on the selected Opportunity, access the **Notes** tab and click **'+' button**.

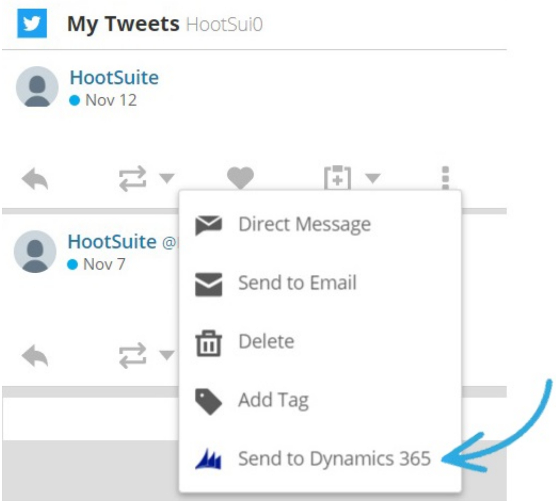


Capture Cases

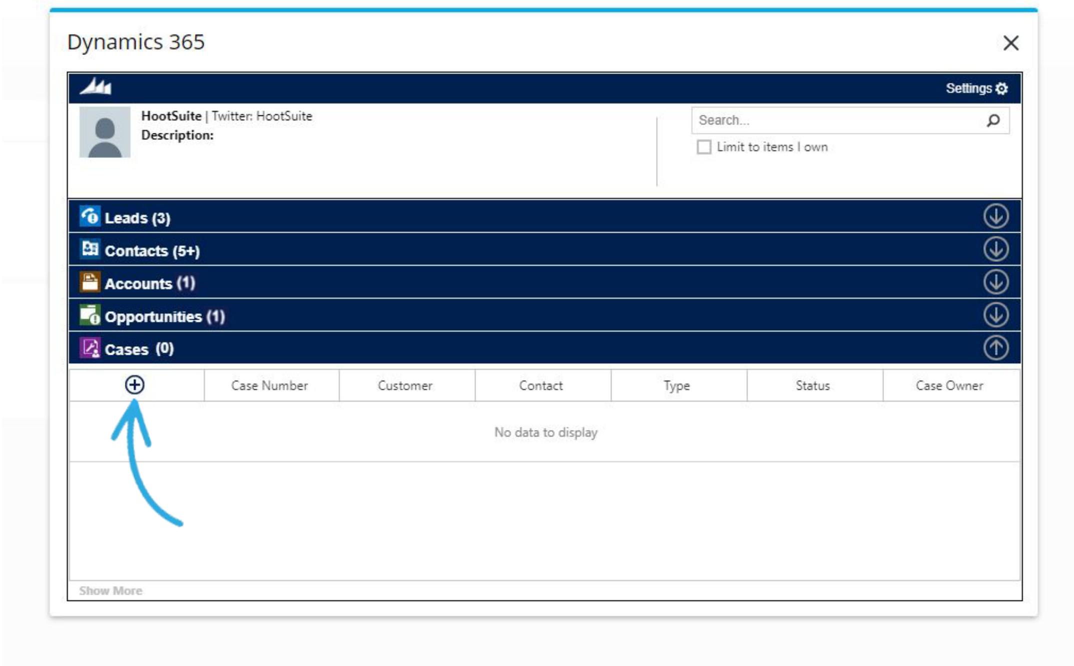
The Microsoft Dynamics integration app also provides the option of creating Microsoft Dynamics cases from messages left on Facebook and Twitter social networks.

Create New Case from Social Contact/Social Message

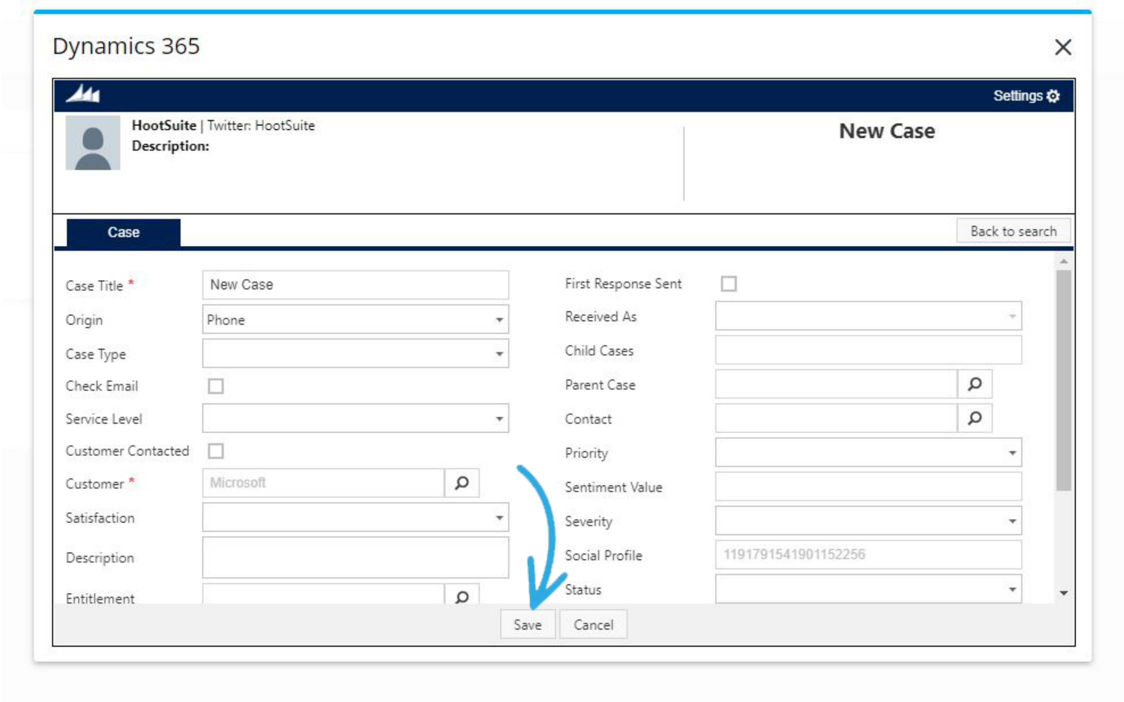
1. From the Hootsuite stream, click on the desired social contact's profile and select the Dynamics option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the 'Send to Dynamics 365' option from the More menu of the social message.



2. Expand the Cases tab and click the '+' button to launch the Case creation wizard



3. The Case Origin and Contact Name fields are automatically filled in with the source social network and the Microsoft Dynamics Contact related to the social contact. Fill in the mandatory Status field, fill in/edit the rest of the fields and click **Save** to create a Case record in Microsoft Dynamics for the social contact. The case will be associated with the Contact and the Account whose names you provided (if you filled in these fields).

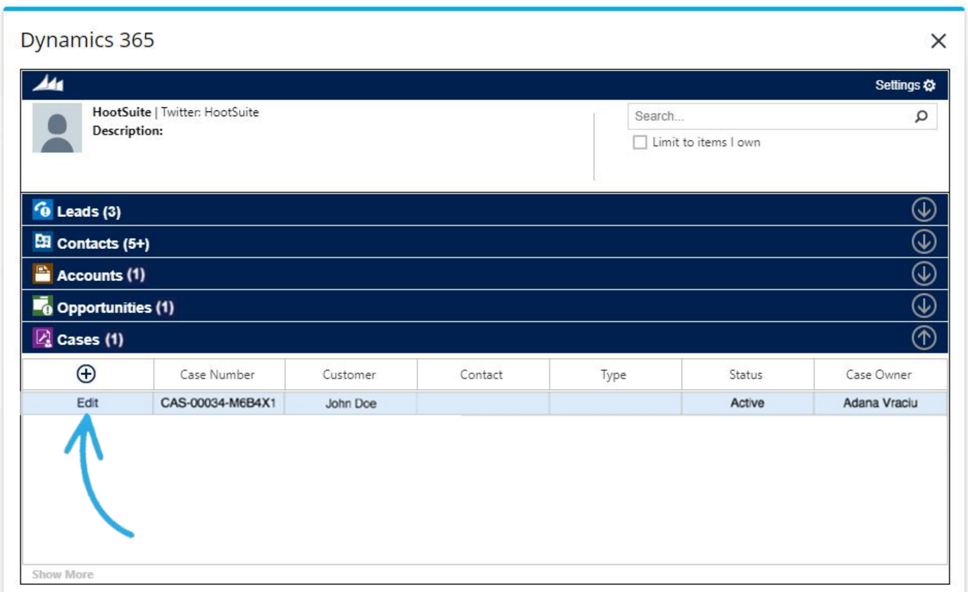


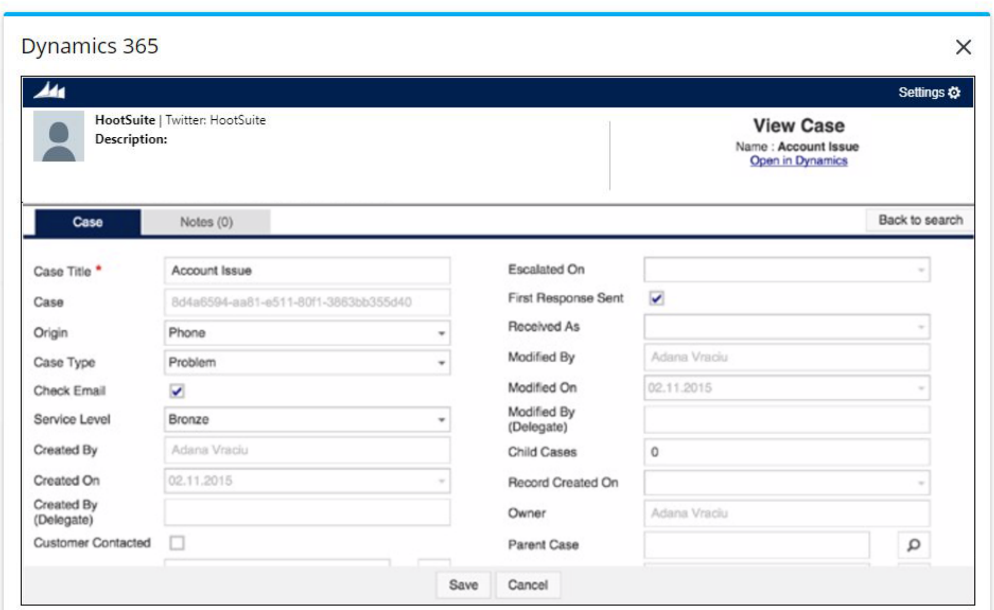
View/Edit Case

All the cases associated with the selected social contact can be found in the **Cases** section. If your Microsoft Dynamics user doesn't have View rights on the Case object, this section won't be available. In order for a case record to be displayed here it must be related to a Microsoft Dynamics account or to a Microsoft Dynamics contact associated with the social contact.

To view details about a case, expand the Cases section and click on the **Edit** link on the left of the desired case and a detailed view of the selected case will be displayed.

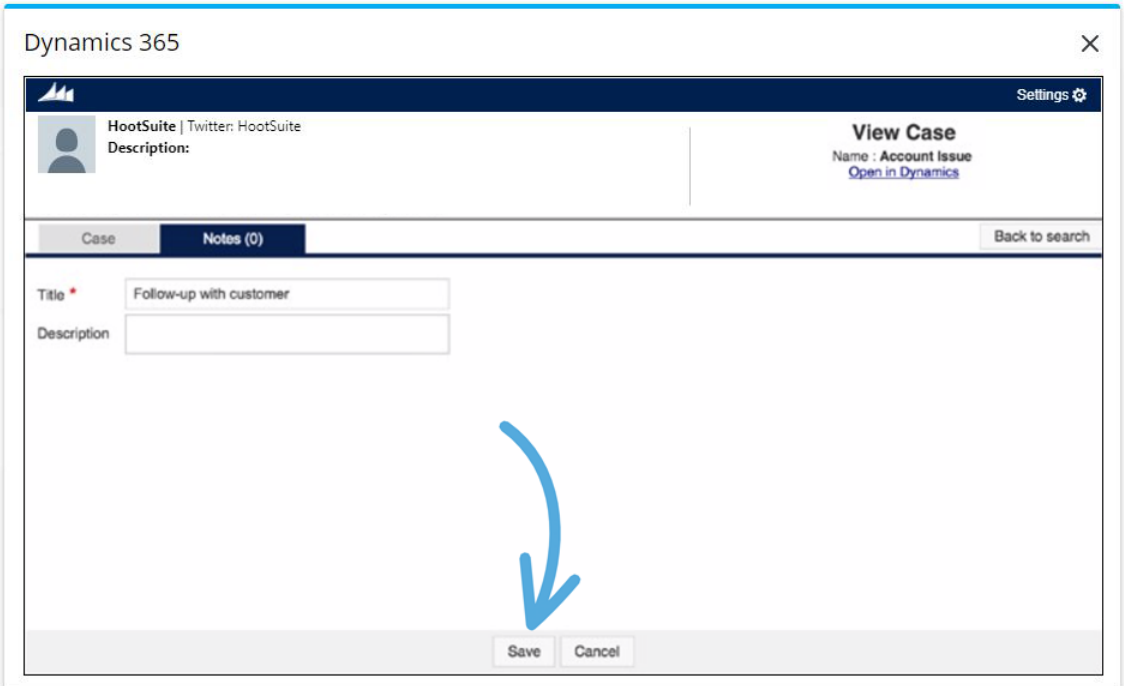
To **edit** information on a Case record, click on the desired field and type the new value. Attention, the greyed out fields are not editable. When finished editing, click **Save** to update and save the lead. If your profile doesn't have the Edit permission on the Case object, then the **Edit** link will be replaced by the **View** link in the grid view and all the fields will be greyed out in the detailed view.

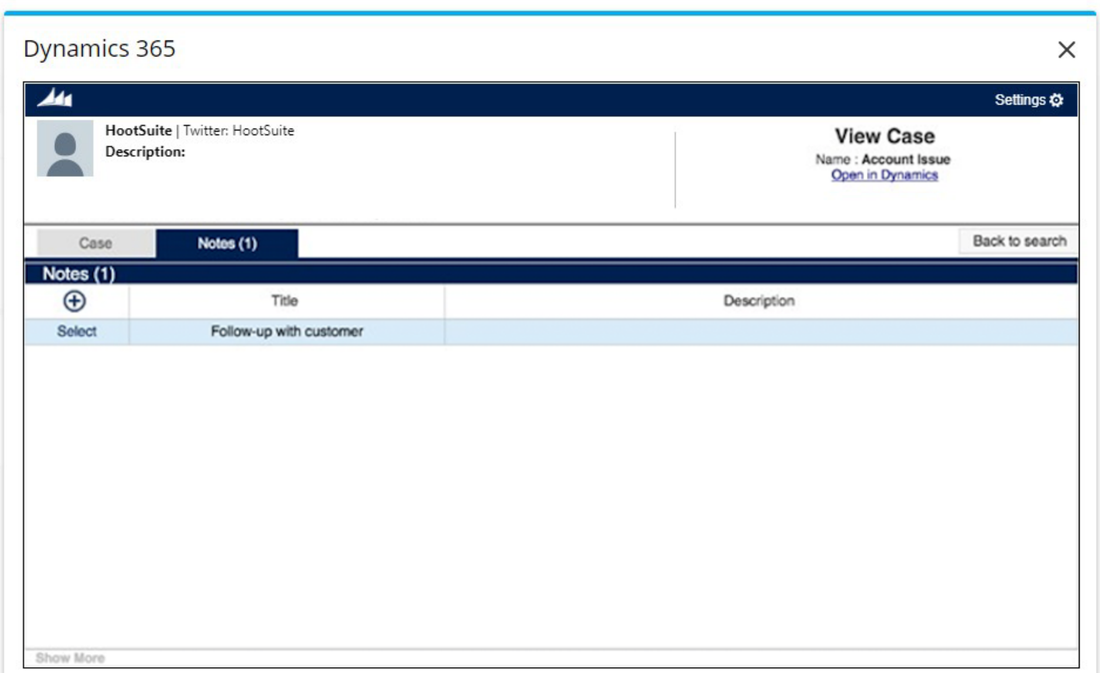




Notes

To log a Note on the selected Case, access the **Notes** tab and click **'+' button**. Provide a title for the note and click **Save**.





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